IRIS 10 Documentation

User manual

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Logging in

Overview

Use this page to:

- Sign in to IRIS10 with your **Username (email)** and **Password**.
- Reset a forgotten password from the sign-in page.
- Understand the sign-in messages and what to do when a sign-in is refused.
- Extend your session when the **Stay Logged In?** window appears.

Before you begin

You need:

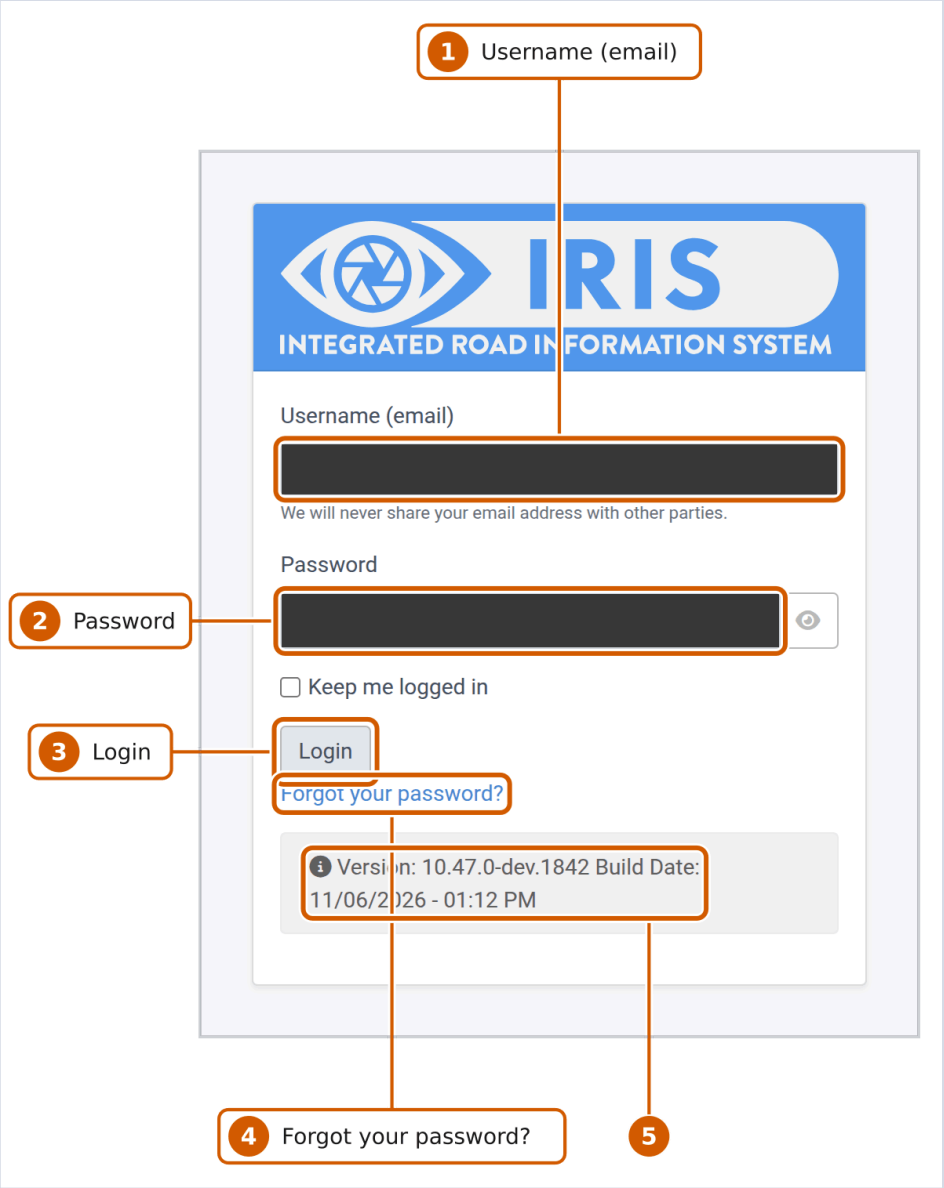
- An IRIS10 user account. Your username is your email address.
- The address of your county's IRIS10 site, open in a web browser.

Procedure

Sign in to IRIS10

1. Open your county's IRIS10 site in your web browser.

   The sign-in page shows the **Username (email)** and **Password** fields, the **Login** button and the **Forgot your password?** link.

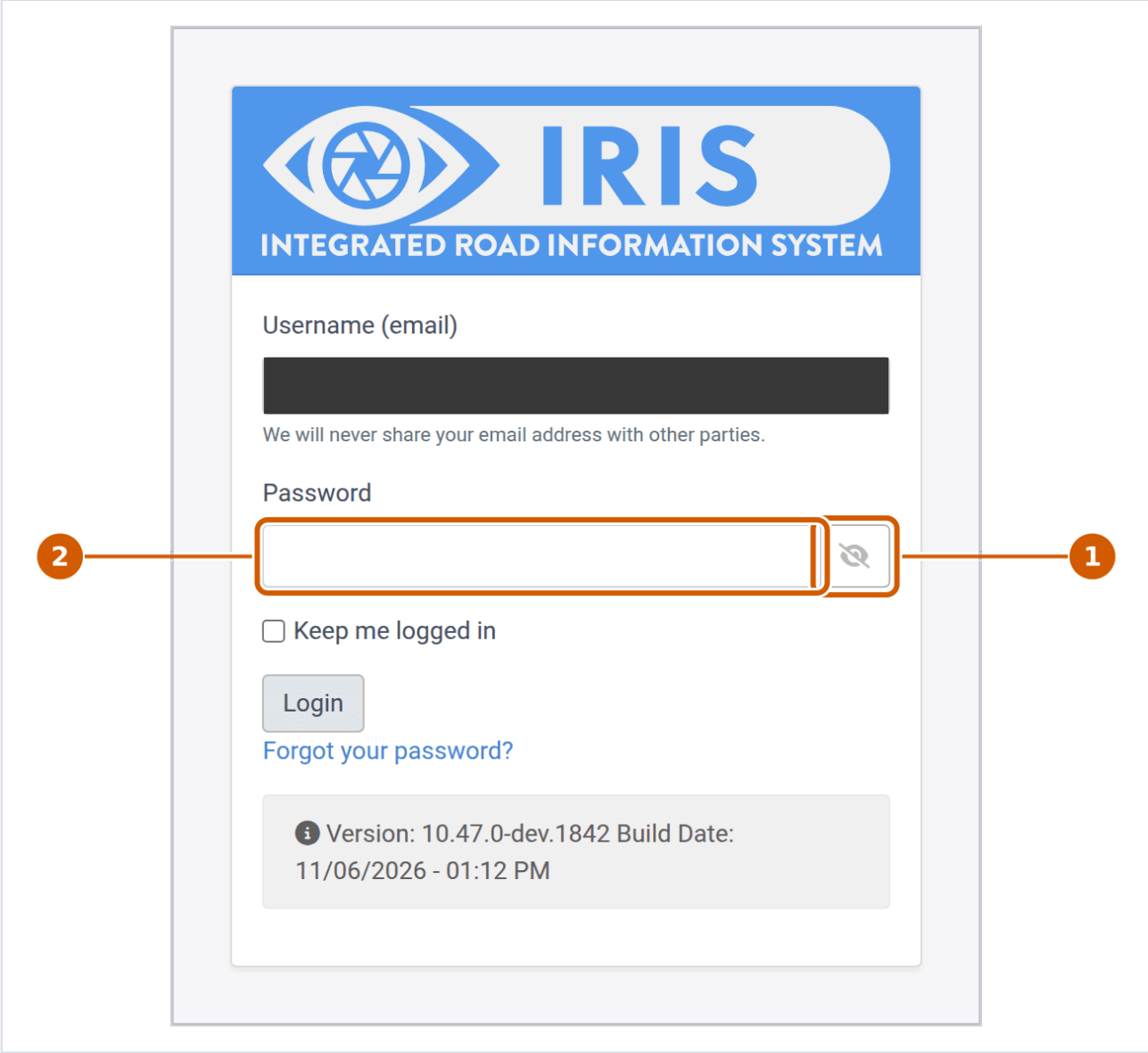


The IRIS10 sign-in page.

1. Username (email)
2. Password
3. Login
4. Forgot your password?
5. Version and build date

2. In **Username (email)**, type the email address your account uses.
3. In **Password**, type your password.
4. Optional: click the password toggle button beside the **Password** field.

   The **Password** field and the toggle button are still shown.



The password toggle button beside the Password field.

1. Password toggle
2. Password

5. Click **Login**.

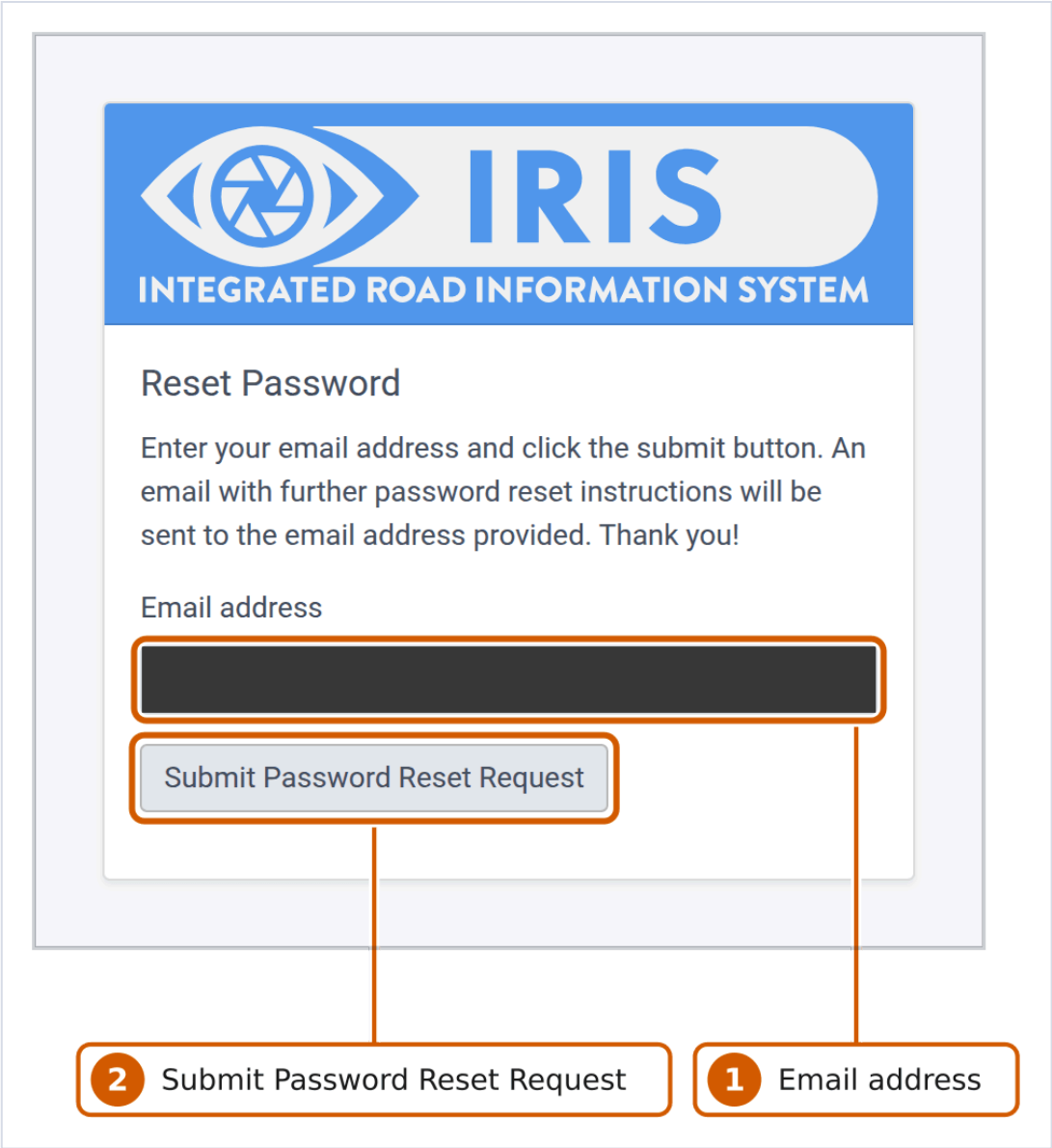
   If the sign-in is refused, a message explains why. See Sign-in messages.

> **Note:** For what you see and how you move around IRIS10 after you sign in, see Navigating portals and pages.

Reset a forgotten password

1. On the sign-in page, click **Forgot your password?**.

   The password reset page opens. It has an **Email address** field and a **Submit Password Reset Request** button.



The password reset page. Enter your email address and click Submit Password Reset Request.

1. Email address
2. Submit Password Reset Request

2. In **Email address**, type the email address your account uses.
3. Click **Submit Password Reset Request**.

   The page says that an email with password reset instructions will be sent to the address you entered.
4. Open the email and follow its instructions.
5. Sign in with the temporary password the email provides.

   The **Change Password** screen opens.
6. On **Change Password**, set a new password.

   Your new password is saved. If repeated failed attempts blocked your sign-in, changing your password clears the block.

Stay signed in when the Stay Logged In? window appears

1. When the **Stay Logged In?** window appears, read the message "Your session is about to expire, sign in to extend the session?".
2. In the window, type the email address your account uses.
3. In the window, type your password.
4. Click **Login**.

   You are signed in again and your session is extended, as the window's message describes.

Reference

Sign-in page elements

ON SCREEN	WHAT IT IS FOR
Username (email)	The email address your IRIS10 account uses. The text under it reads "We will never share your email address with other parties."
Password	Your IRIS10 password.
Password toggle button (no text)	A button beside the **Password** field.
Login	Submits your username and password.
Forgot your password?	Opens the password reset page.
Version: … Build Date: …	Shows the IRIS10 version and build date of the site you are using.

Password reset page elements

ON SCREEN	WHAT IT IS FOR
Email address	The email address your IRIS10 account uses.
Submit Password Reset Request	Asks IRIS10 to email you password reset instructions.

Sign-in messages

MESSAGE	WHAT IT MEANS	WHAT TO DO
`Invalid login and/or password.`	The username or password is wrong.	Check both fields and try again. If you have forgotten your password, use **Forgot your password?**.
`Too many failed sign-in attempts. Please wait and try again later, or use Forgot Password.`	Sign-in from your location is blocked for a while after repeated failed attempts. The message does not say how long the block lasts.	Wait and try again later, or reset your password with **Forgot your password?** and sign in with the temporary password from the email.

Tips and notes

Important: If you see "Too many failed sign-in attempts. Please wait and try again later, or use Forgot Password.", don't keep retrying. Either wait, or click **Forgot your password?** and sign in with the temporary password from the email. That takes you to **Change Password**, and changing your password clears the block.

Note: Clicking **Login** ends any session already open in that browser before it checks your password. A failed attempt therefore also signs that browser out.

Note: The password reset page has no link back to the sign-in page.

Note: IRIS10 signs you out when your session ends. Save your work before you step away.

Tip: The bottom of the sign-in page shows the version and build date, for example `Version: 10.47.0-dev.1840 Build Date: 11/05/2026 - 04:31 PM`. Include this when you report a problem.

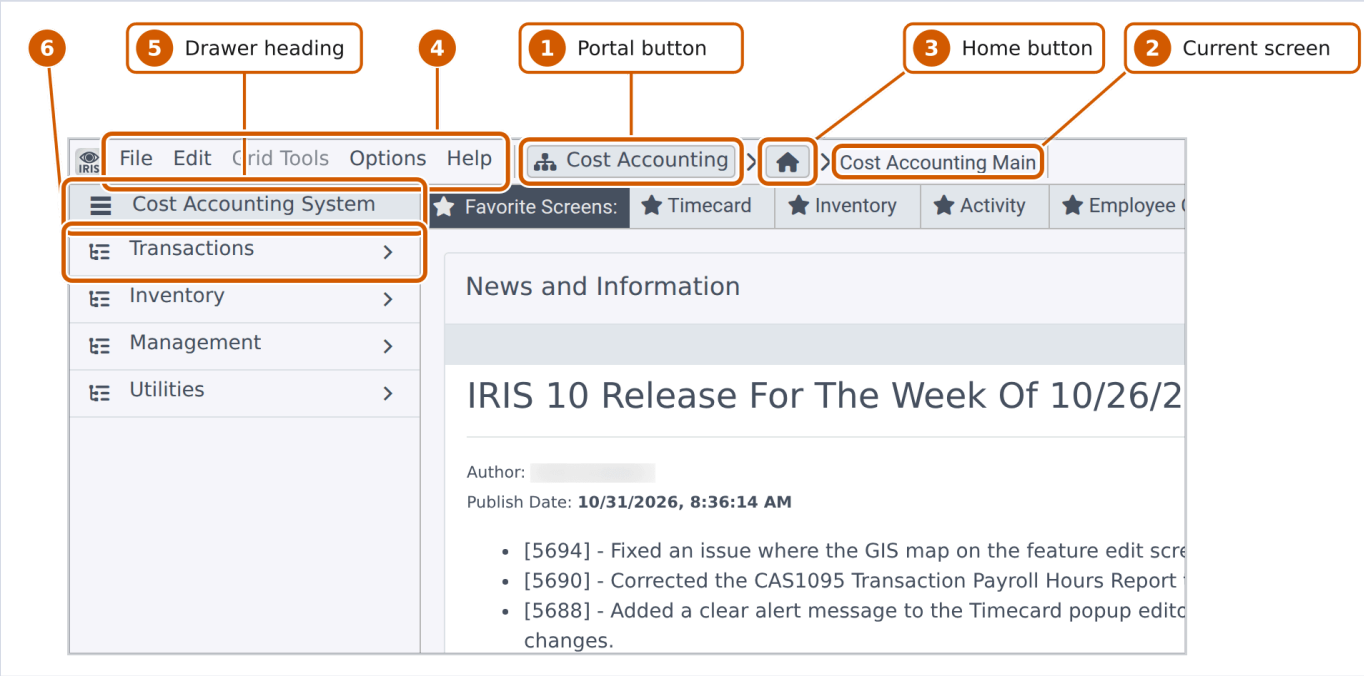
Related topics

- Navigating portals and pages

Navigating portals and pages

Overview

IRIS10 has several portals, such as Cost Accounting. Each portal has a dashboard and a set of screens. This page describes the main areas of a portal screen: the portal button, the current screen label, the home button, the menu bar and the drawer. It also shows how to switch portals, open a screen from the drawer, reopen a screen from **Favorite Screens**, return to the portal dashboard and collapse the drawer.



The Cost Accounting dashboard: header controls along the top and the drawer on the left.

1. Portal button
2. Current screen
3. Home button
4. Menu bar
5. Drawer heading
6. Drawer categories (Transactions, Inventory, Management, Utilities)

Before you begin

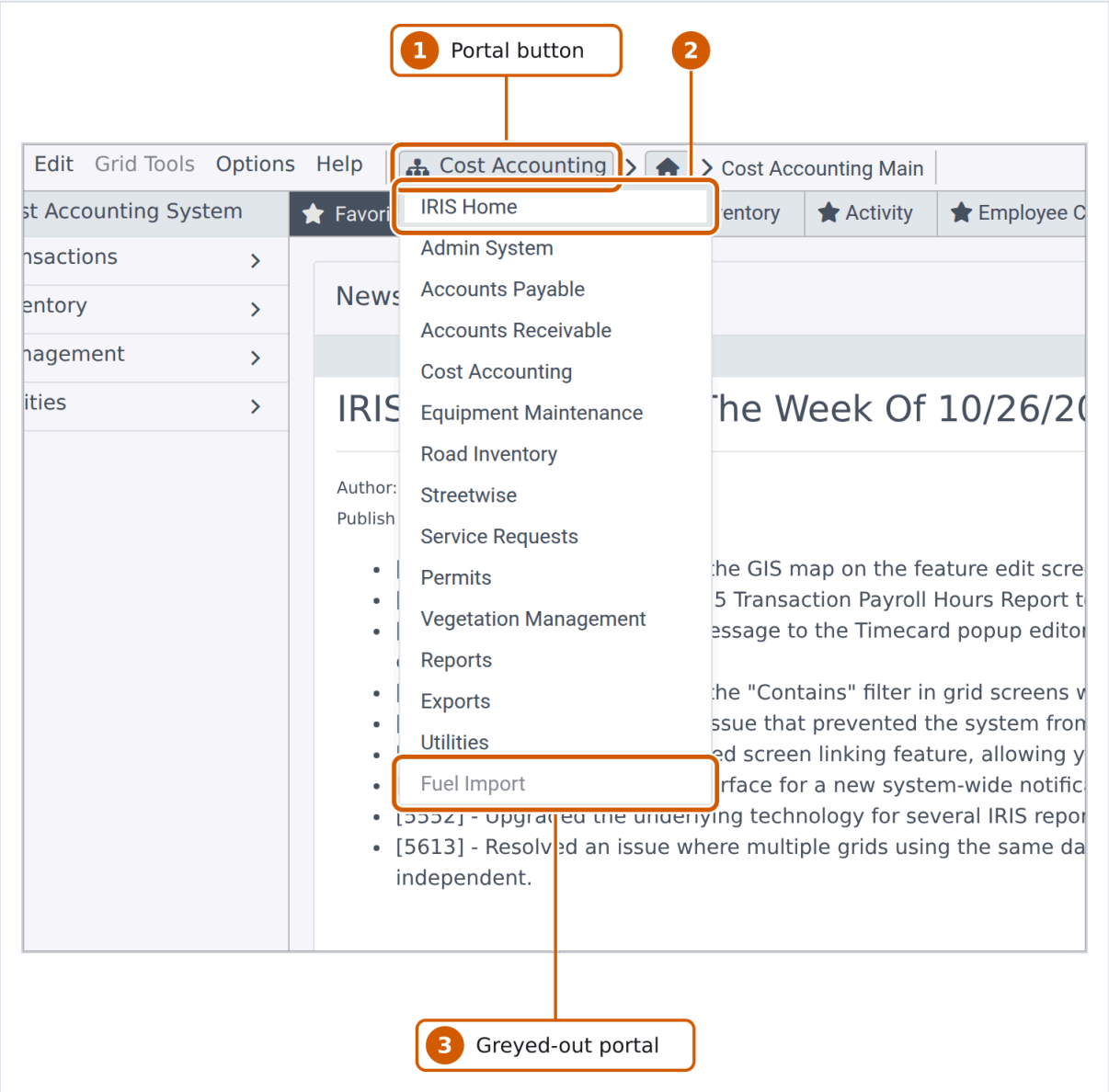
- You are signed in to IRIS10 (see Logging in).
- You know which portal you intend to use (for example, **Cost Accounting** or **Road Inventory**).

Procedure

Switch to another portal

1. In the header, click the portal button. It shows the name of the current portal (for example **Cost Accounting**), and its tooltip reads "Click to select a portal." A list of portals opens, starting with **IRIS Home** and ending with **Fuel Import**.

> **Note:** You cannot select portals that are greyed out because your account does not have access to them.



The portal list. Greyed-out portals are not available to your account.

1. Portal button
2. IRIS Home

3. Greyed-out portal

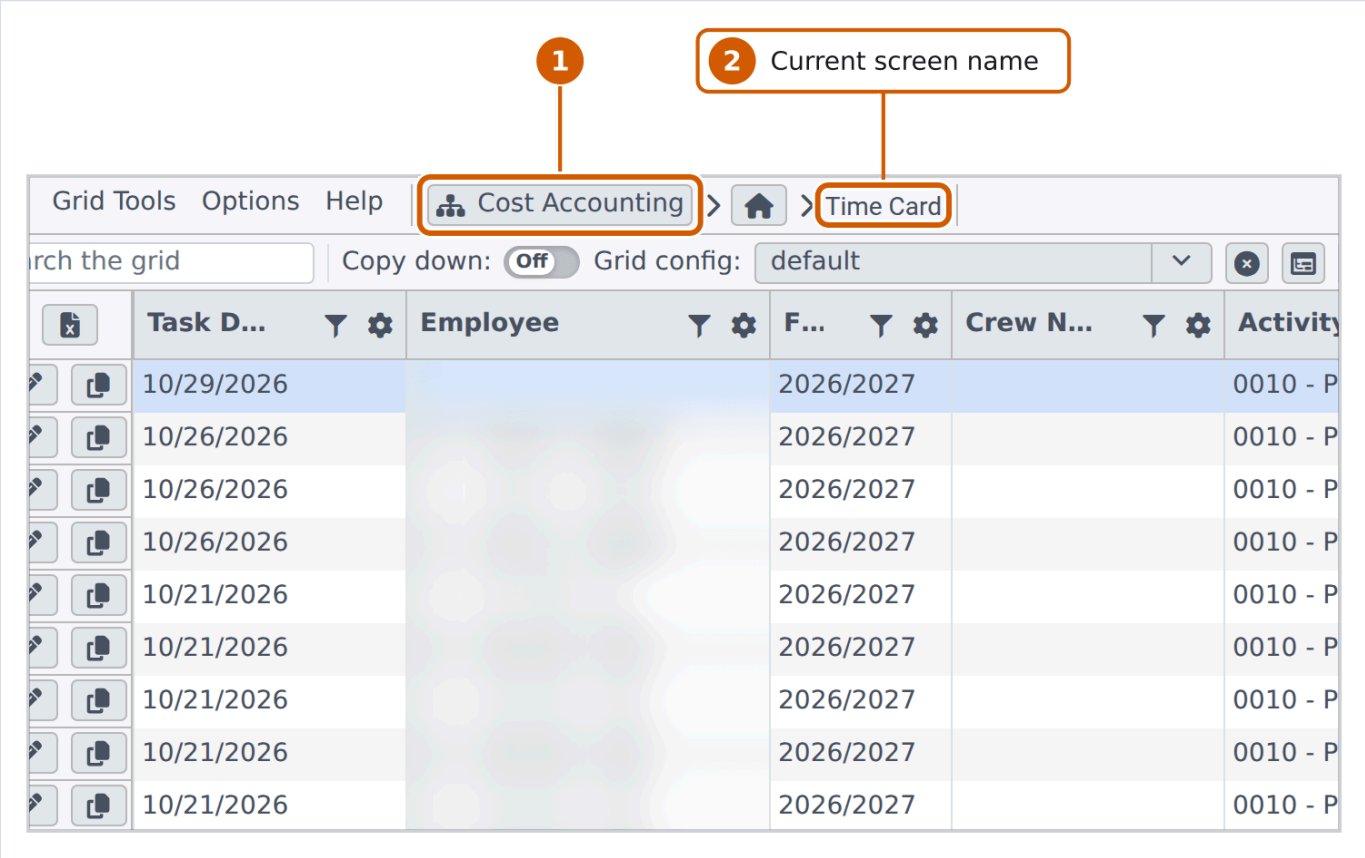
2. Click the name of the portal you want, for example **Road Inventory**. The portal opens in a new browser tab. The original portal stays open in its own tab.

> **Note:** If a portal you need is greyed out, ask your IRIS10 administrator for access.

3. In the new tab, check the portal button in the header. The portal button shows the name of the portal you opened.

Open a screen from the drawer

1. In the drawer on the left, find the category that contains the screen you want: **Transactions**, **Inventory**, **Management** or **Utilities** (Cost Accounting portal shown).
2. Click the screen you want, for example **Time Card**. The screen opens, and the label next to the portal button shows the screen name, for example **Time Card**.



With a screen open, the header shows the screen name. The portal button still shows the portal.

1. Current portal
2. Current screen name

Open a screen from Favorite Screens

1. IRIS will automatically designate the most commonly visited screens as **Favorite Screens**.

2. Click the home button in the header (tooltip "Click to return to portal dashboard"). The portal dashboard opens. The screen label reads the portal name followed by **Main**, for example **Cost Accounting Main**.
3. Under **Favorite Screens**, click the title of the screen you want. Each one shows a star icon next to its title. The screen opens, and the header shows its name.

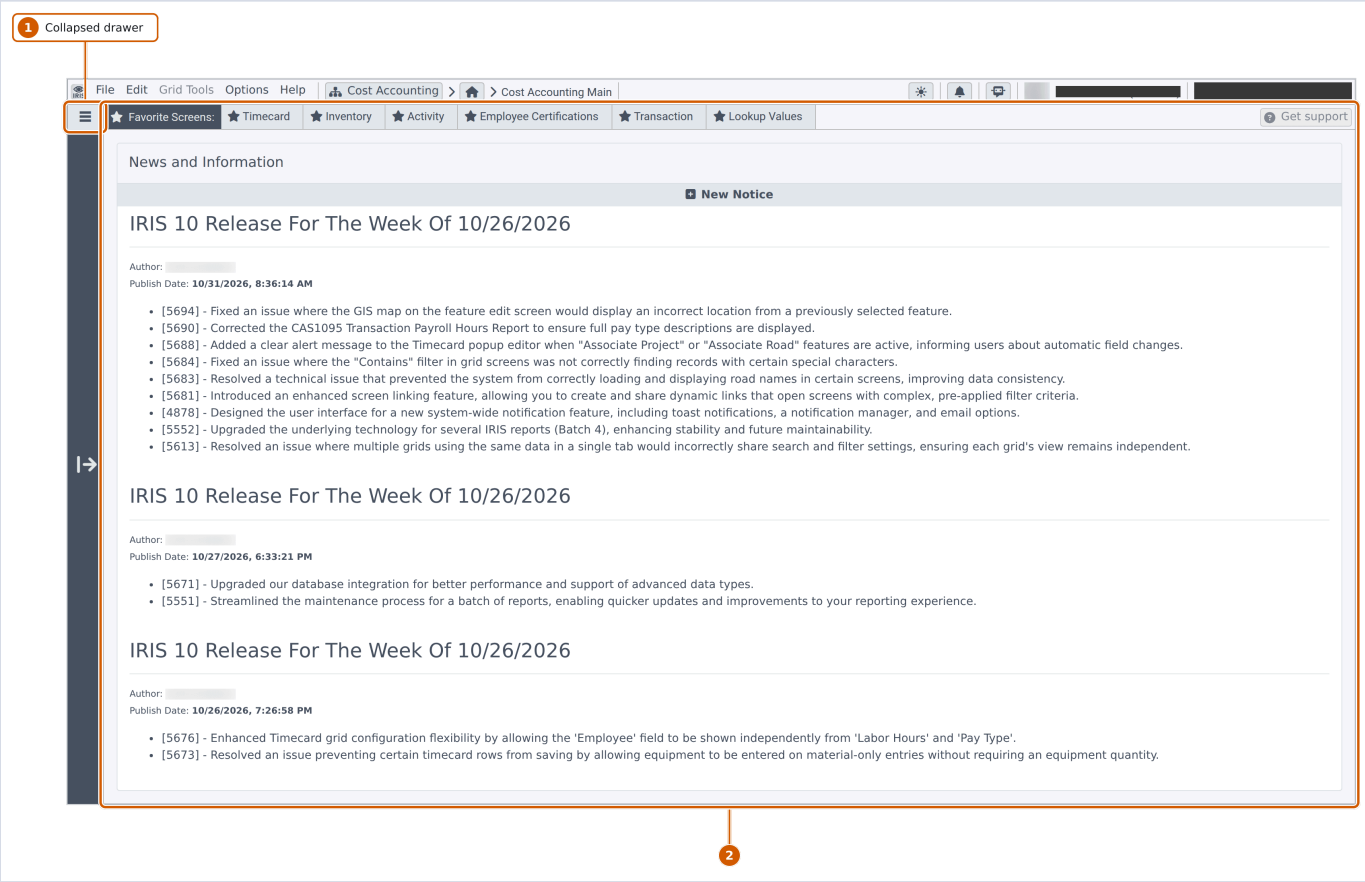
Return to the portal dashboard

1. From any screen, click the home button in the header (tooltip "Click to return to portal dashboard"). The portal dashboard opens, and the screen label reads the portal's **Main** page, for example **Cost Accounting Main**.

> **Note:** If you open a portal's dashboard that you do not have access to, IRIS10 sends you to **IRIS Home**.

Collapse the drawer

1. At the top of the drawer, click the portal heading (for example **Cost Accounting System**). The drawer collapses to a compact bar. The compact bar hides the categories and shows the portal heading.



The drawer collapsed to a compact bar, leaving more room for the dashboard.

1. Collapsed drawer

2. Dashboard content, including Favorite Screens

Reference

Parts of the portal screen

ELEMENT	WHAT YOU SEE	WHAT IT DOES
Portal button	The current portal name, for example **Cost Accounting**. Tooltip: "Click to select a portal."	Opens the list of portals.
Current screen label	The name of the open screen, for example **Cost Accounting Main** on the dashboard or **Time Card** on a screen.	Shows where you are.
Home button	Tooltip: "Click to return to portal dashboard."	Returns to the current portal's dashboard.
Menu bar	**File**, **Edit**, **Grid**, **Tools**, **Options**, **Help**	Menus for working with the open screen.
Drawer heading	The portal heading, for example **Cost Accounting System**.	Collapses the drawer.
Drawer categories	For Cost Accounting: **Transactions**, **Inventory**, **Management**, **Utilities**	Group the portal's screens.

Portal list

The list shows the portals in this order.

PORTAL (AS SHOWN IN THE LIST)	NOTES
IRIS Home	Always available.
Admin System	
Accounts Payable	Greyed out if you do not have access.
Accounts Receivable	Greyed out if you do not have access.
Cost Accounting	Greyed out if you do not have access.
Equipment Maintenance	Greyed out if you do not have access.
Road Inventory	Greyed out if you do not have access.
Streetwise	Greyed out if you do not have access.
Service Requests	Greyed out if you do not have access.
Permits	Greyed out if you do not have access.
Vegetation Management	Greyed out if you do not have access.
Reports	Greyed out if you do not have access.
Exports	Greyed out if you do not have access.

PORTAL (AS SHOWN IN THE LIST)	NOTES
Utilities	Not restricted by portal access.
Fuel Import	Available only to some agencies; greyed out for all others. Greyed out if you do not have access.

Tips and notes

Note: Choosing a portal from the portal list opens it in a new browser tab, so you can keep working in more than one portal at the same time.

Tip: Favorite Screens fills itself. IRIS10 lists the screens you visit most often in the current portal, most visited first, and shows up to six.

Note: If you have not visited any screens yet, the dashboard shows "No favorite screens yet. As you visit screens, they will appear here."

Note: Screens you can no longer access do not appear in **Favorite Screens**.

Important: A greyed-out portal means your account does not have access to it. Ask your IRIS10 administrator if you need it.

Note: For administrators: unless you give a user a specific access level for a portal, their access to that portal follows their general access level. With default settings, an active user can see every portal.

Note: The same portal can appear under slightly different names. For example, the portal button shows **Cost Accounting**, the drawer heading shows **Cost Accounting System** and the dashboard label shows **Cost Accounting Main**.

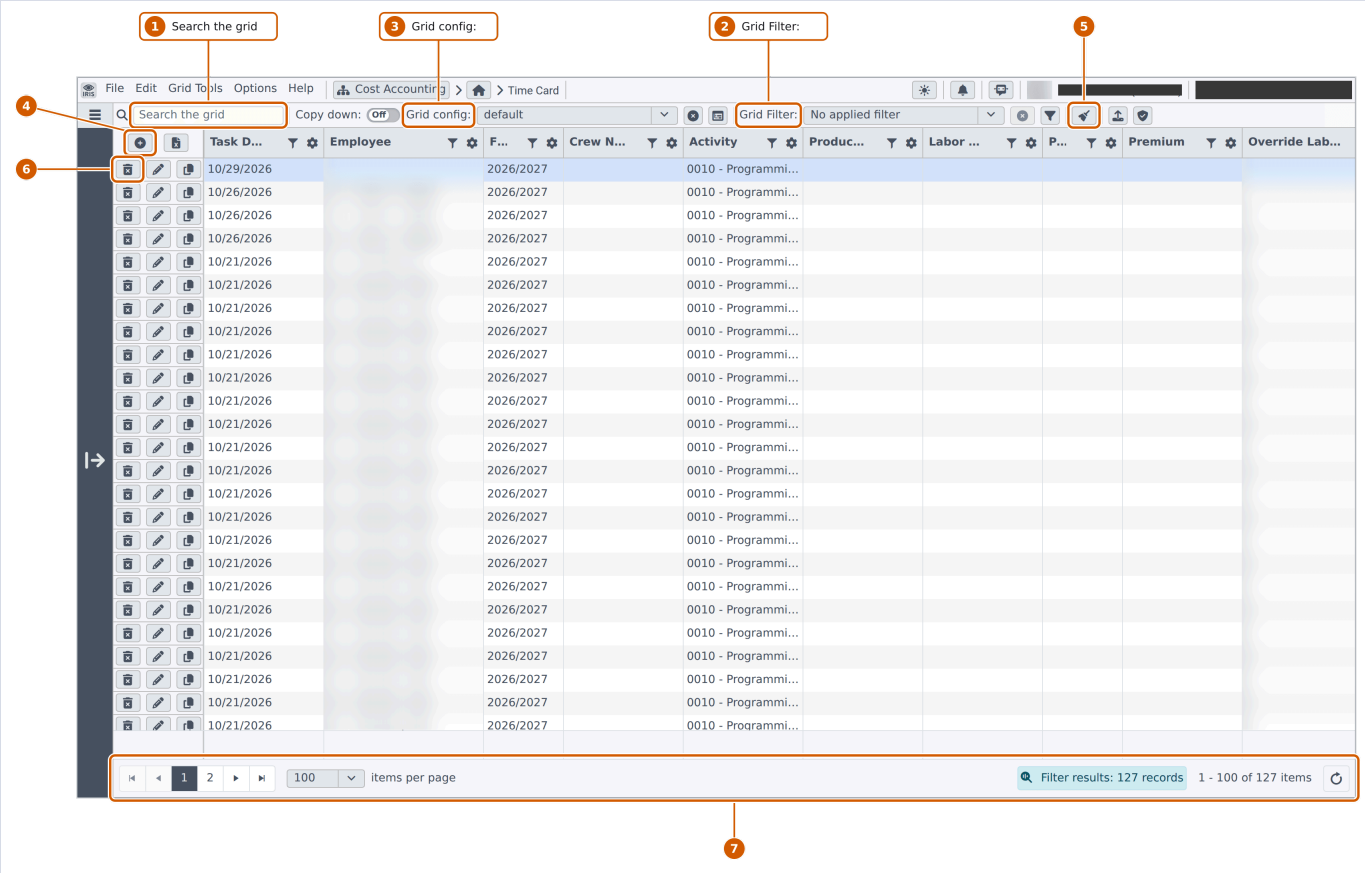
Related topics

- Logging in
- Data grid overview and basics

Data grid overview and basics

Overview

You see the same grid layout on most IRIS10 lists. This page uses Time Card as the example. On a grid, you see a toolbar above the rows, column headings, row buttons, and a pager at the bottom.



The Time Card grid shows the parts most IRIS10 grids share.

1. Search the grid
2. Grid Filter:
3. Grid config:
4. Add new record
5. Bulk delete mode
6. Row buttons: Delete, Edit, Duplicate, view cell
7. Pager and record count

In this topic, you learn to:

- Recognize the parts of an IRIS10 grid: toolbar, column headings, row buttons, and pager.
- Find records with **Search the grid**, sorting, and paging.
- Open a column's menu and see what it offers.

- Find where to start adding, editing, duplicating, and deleting records.

Before you begin

- You can sign in to IRIS10.
- You can open a page that contains a grid, for example Time Card at `/cas/timecard`. See Navigating portals and pages.

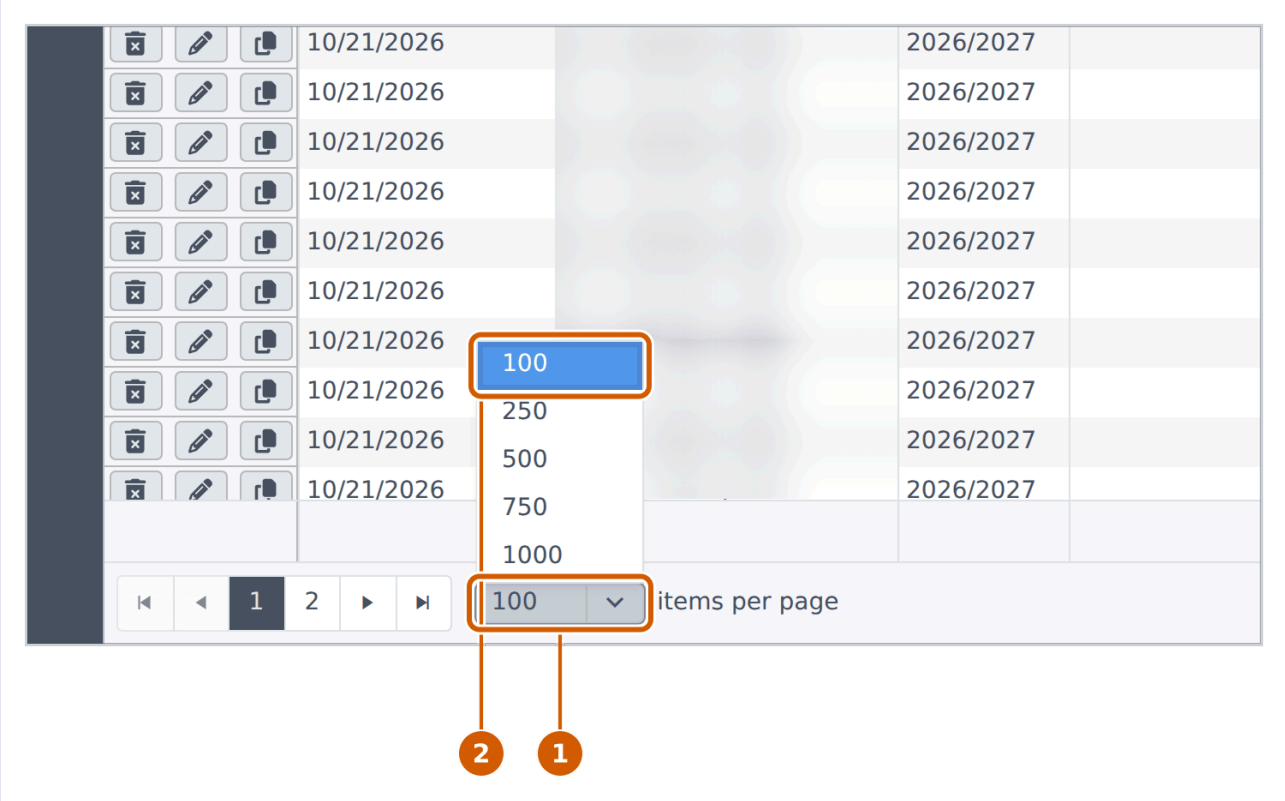
Procedure

Check how many records the grid holds and change the page size

1. Look at the pager at the bottom of the grid.

   The pager shows the page buttons, the items-per-page setting and the record count, for example `Filter results: 127 records` and `1 - 100 of 127 items`.
2. Click the **Page sizes** drop-down in the pager.

   The list offers 100, 250, 500, 750 and 1000.



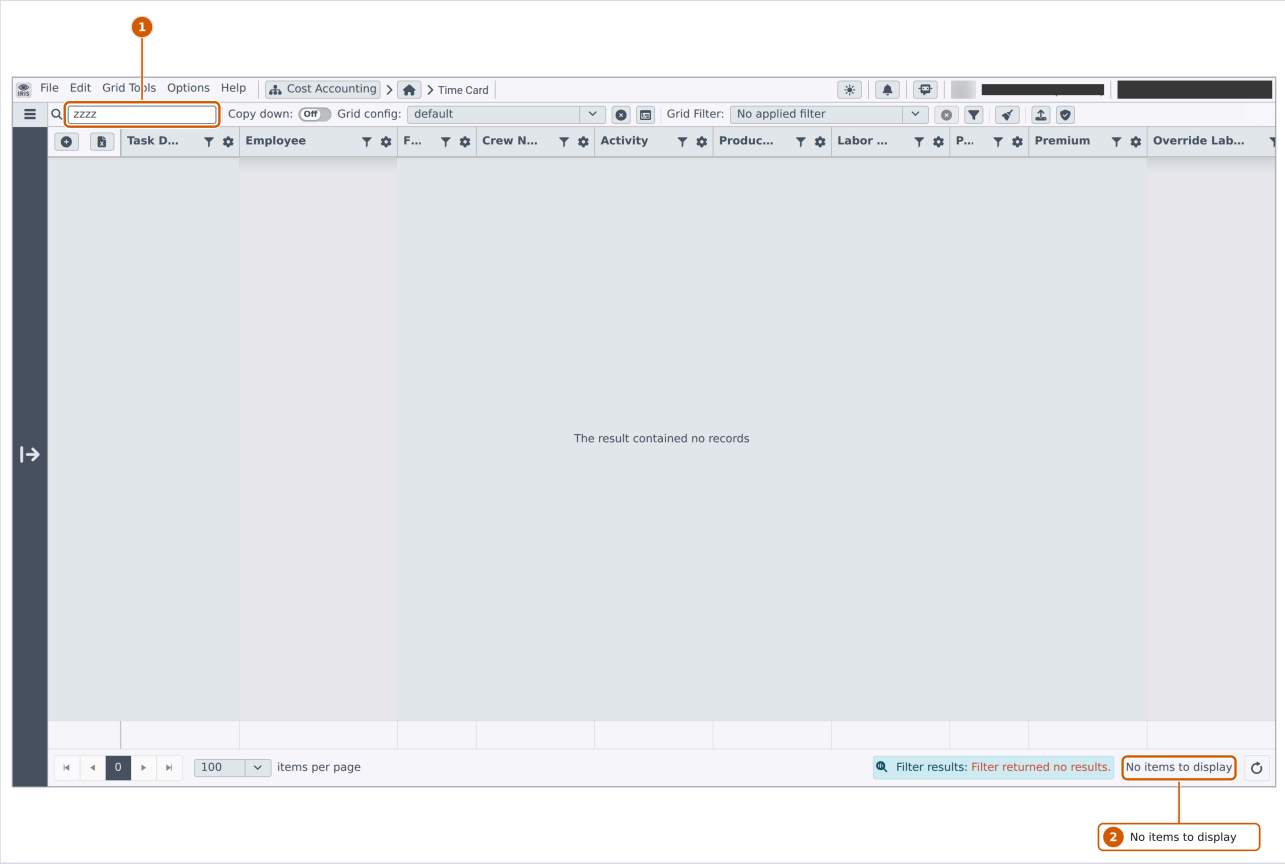
Choose how many rows to show on each page.

   1. Page sizes
   2. Page size choices
3. Choose the number of rows you want to see on each page.

Search the grid

1. Click the toolbar box that shows **Search the grid**.
2. Type the text you want to find.
3. Press Enter.

   The grid updates. If nothing matches, the pager shows `Filter returned no results.` and `No items to display`.



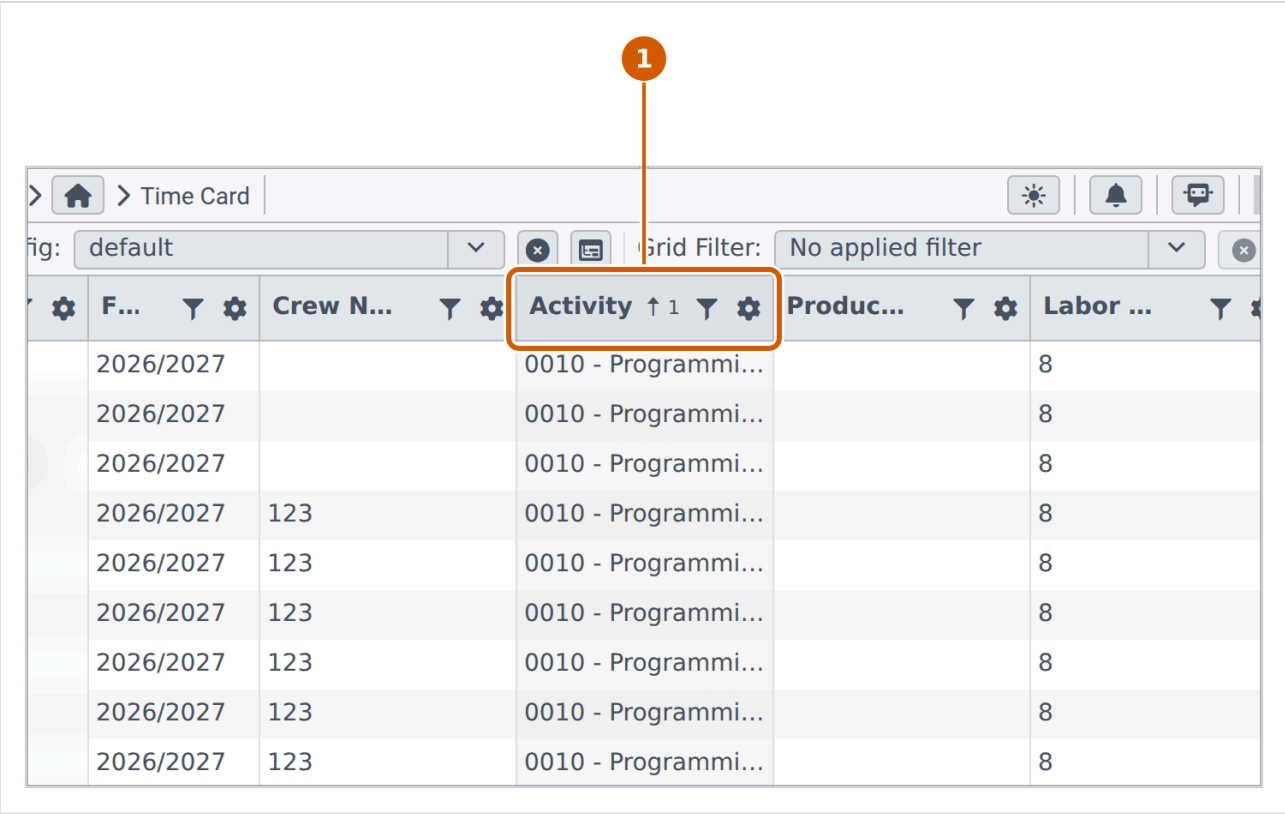
When a search finds nothing, the pager shows 'No items to display'.

1. Search text
2. No items to display

Sort by a column

1. Click a column heading, for example **Activity**.

   The grid sorts the rows in ascending order by that column, and the heading shows `1` next to the column name (for example `Activity 1`).



Click a column heading to sort by that column.

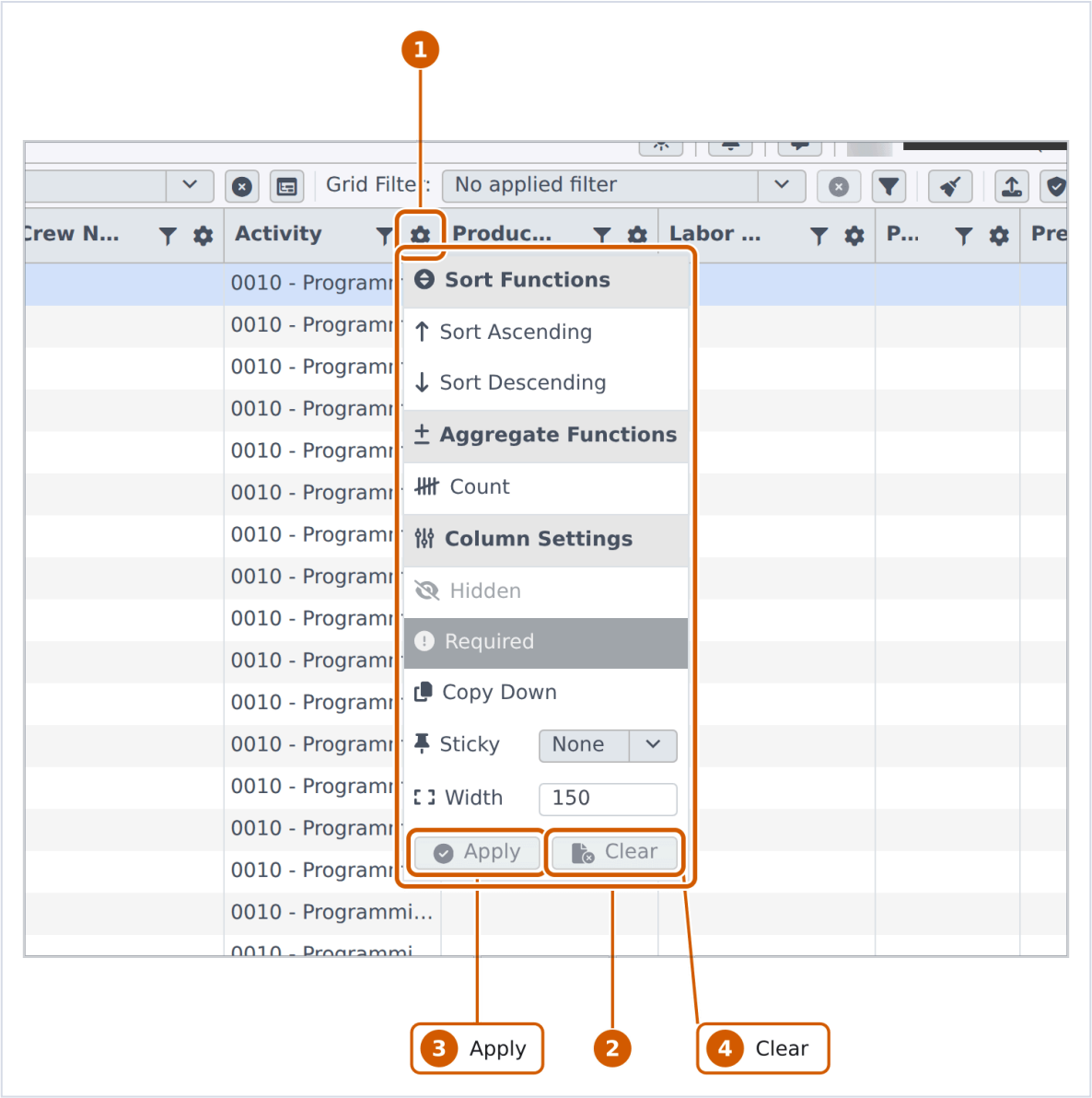
1. Sorted column (Activity 1)

2. To sort additional columns, click another column heading.

Open a column's menu

1. In the column heading, click the column menu icon. It has no text label.

   A menu opens with three sections: **Sort Functions** (Sort Ascending, Sort Descending), **Aggregate Functions** (Count) and **Column Settings** (Hidden, Required, Copy Down, Sticky, Width). It also has **Apply** and **Clear** buttons.



The column menu for Activity has Sort Functions, Aggregate Functions and Column Settings.

1. Column menu icon
2. Column menu
3. Apply
4. Clear

2. Choose **Sort Ascending** or **Sort Descending** to sort by this column.
3. To change a column setting, use the **Column Settings** section.

   Apply (tooltip: "Apply grid configuration.") and **Clear** (tooltip: "Clear grid configuration.") stay unavailable until you make a change.

> **Note:** For saving settings, see Grid configurations.

Start working with records

The toolbar also has a **Bulk delete mode** button (tooltip: "Click to enter bulk delete mode."). For details on working with records, including bulk delete, see Grid viewing and editing.

1. To add a record, click the add button above the grid. Its tooltip is "Add new record. (ctrl shift a)".
2. To change a record, click the row's "Edit record (ctrl+shift+e)" button.

   The record opens in a pop-up window for editing.
3. To copy a record, click the row's "Duplicate record" button.
4. To remove a record, click the row's "Delete record" button.

   IRIS10 asks "Are you sure you want to delete this record?" before it deletes anything.

   > **Note:** You can delete only if your security level allows it. IRIS10 checks this when you delete. If you cannot delete, ask your administrator.

Reference

Grid toolbar and row controls (Time Card example)

CONTROL	ON-SCREEN LABEL OR TOOLTIP	PURPOSE
Search box	Search the grid	Type text and press Enter to search the grid.
Grid filter drop-down	Grid Filter:	Choose a grid filter (see Grid filters).
Grid configuration drop-down	Grid config:	Choose a grid configuration (see Grid configurations).
Add button	Add new record. (ctrl shift a)	Add a new record.
Bulk delete button	Bulk delete mode (tooltip: Click to enter bulk delete mode.)	Enter bulk delete mode.
Row button	Edit record (ctrl+shift+e)	Edit the record in a pop-up window.
Row button	Duplicate record	Copy the record.
Row button	Delete record	Delete the record after confirmation.
Row button	Click to view the cell contents.	View the cell contents.

Page sizes

GRID TYPE	PAGE SIZES OFFERED
Main grid	100, 250, 500, 750, 1000
Child (nested) grid	5, 10, 50, 100, 150, 200

Column menu contents

SECTION	ITEMS
Sort Functions	Sort Ascending, Sort Descending
Aggregate Functions	Count
Column Settings	Hidden, Required, Copy Down, Sticky (shows `None`), Width
Buttons	Apply, Clear

What you can do on the main grid

CAPABILITY	AVAILABLE
Sort by more than one column	Yes
Resize columns	Yes
Reorder columns	Yes
Select rows	One row at a time
Group rows by column	No (Time Card)

Tips and notes

Tip: Keyboard shortcuts appear in the tooltips: ctrl shift a adds a record, and ctrl+shift+e edits a record.

Note: Grids that track notes show a **Notes** column, which you cannot sort by. Most of these grids also show a **Documents** column.

Note: If a search finds nothing, the pager shows `Filter returned no results.` and `No items to display`.

Important: Deleting a record always asks for confirmation first. Read the message before you continue.

Note: Main grids use larger page sizes (100 to 1000) than child grids nested inside a record (5 to 200).

Related topics

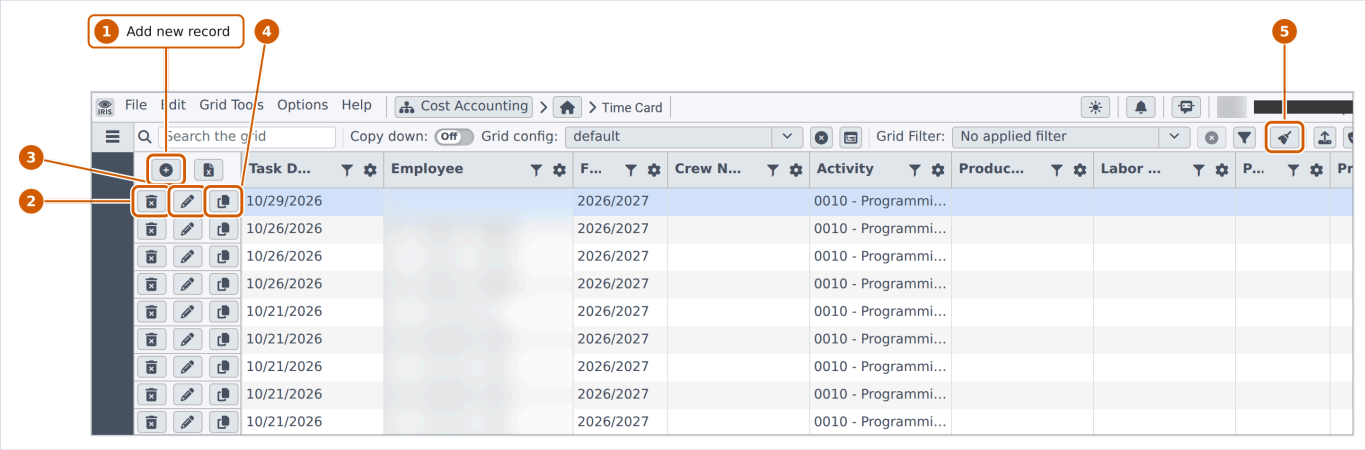
- Grid viewing and editing
- Grid configurations
- Grid filters
- Navigating portals and pages

Grid viewing and editing

Overview

Most IRIS10 grids edit records in a pop-up window. Some lookup and reference screens edit within the row instead. This page uses the Time Card grid as the example.

The **Add** button is in the grid header. The **Delete**, **Edit**, and **Duplicate** buttons are on each row. The toolbar also has the **Bulk delete mode** button.



The Time Card grid with the Add button in the header and the Delete, Edit, and Duplicate buttons on each row.

1. Add new record
2. Delete record
3. Edit record
4. Duplicate record
5. Bulk delete mode

With this page you can:

- Add a new record using the pop-up editor.
- Edit an existing record and cancel changes you do not want.
- Duplicate a record to start a similar new one.
- Recognize and fix required-field messages before saving.
- Delete a record using the confirmation message.
- Use Copy Down to fill repeated values into new records, and choose which columns copy.

Before you begin

- Sign in to IRIS10.
- Open a grid screen such as Time Card. See Navigating portals and pages.
- Know the grid basics: paging, sorting, searching, and column menus. See Data grid overview and basics.

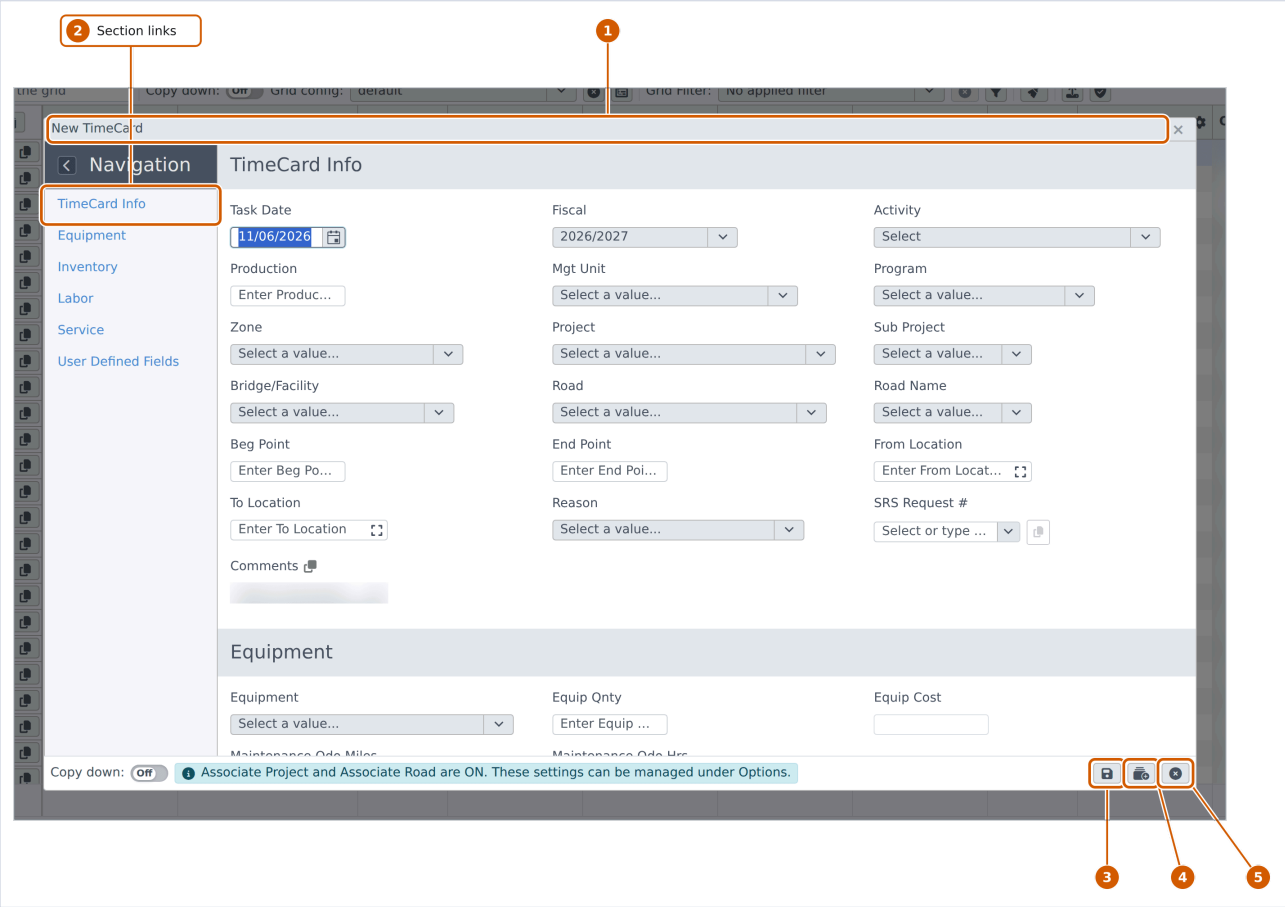
- Check your security access. The Add, Edit, Duplicate, and Delete buttons appear only if your security access for the screen allows those actions. If a button is missing, ask your IRIS10 administrator.

Procedure

Add a new record

1. In the grid header, click the Add button (tooltip "Add new record. (ctrl shift a)"). A pop-up window opens with a title such as "New TimeCard".

> **Note:** The Add button appears only if your security access allows adding records on this screen. If you do not see it, ask your administrator.



The New TimeCard window, with section links and the Save, Save and Add New and Cancel buttons.

1. Window title
2. Section links
3. Save
4. Save and Add New
5. Cancel

2. Click a section link at the side of the window (for example **Time Card Info**, **Equipment**, **Inventory**, **Labor**, **Service**, or **User Defined Fields**). The form scrolls to that section.
3. Fill in the fields, including every required field (for example **Task Date**).
4. Click **Save** (tooltip "Click to save the current record.") to save the record.
5. Alternatively, click **Save and Add New** to save the record and start another new record.

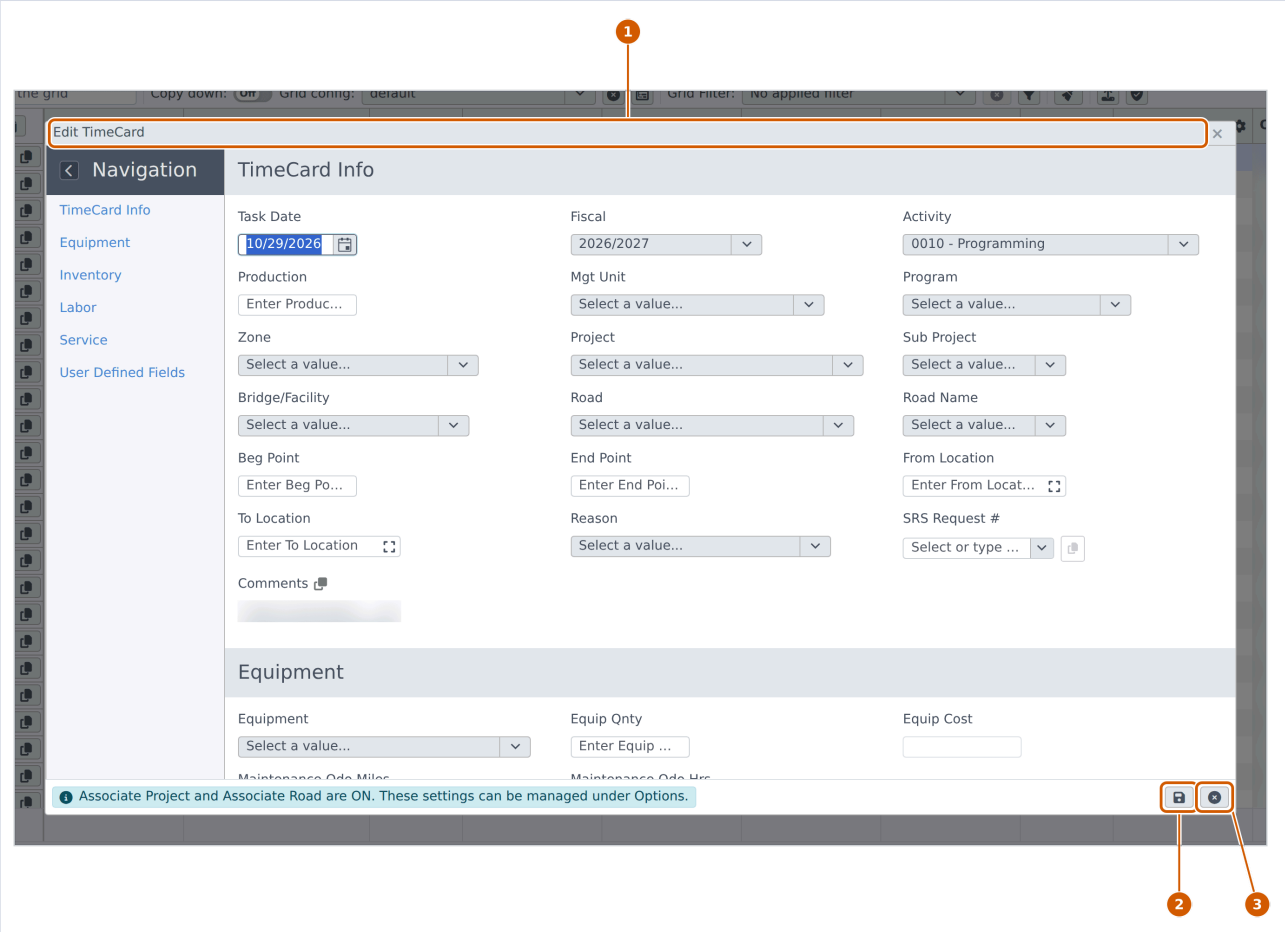
> **Note: Save and Add New** is shown only when you are adding a new record.

6. To leave without saving, click **Cancel** (tooltip "Click to cancel the edit operation.").

Edit a record

1. In the row you want to change, click the Edit button (tooltip "Edit record (ctrl+shift+e)"). A pop-up window opens with a title such as "Edit TimeCard", showing the same fields and section links as when adding.

> **Note:** Row buttons appear only if your security access allows editing on this screen.



The Edit TimeCard window. Save and Add New is not offered when editing.

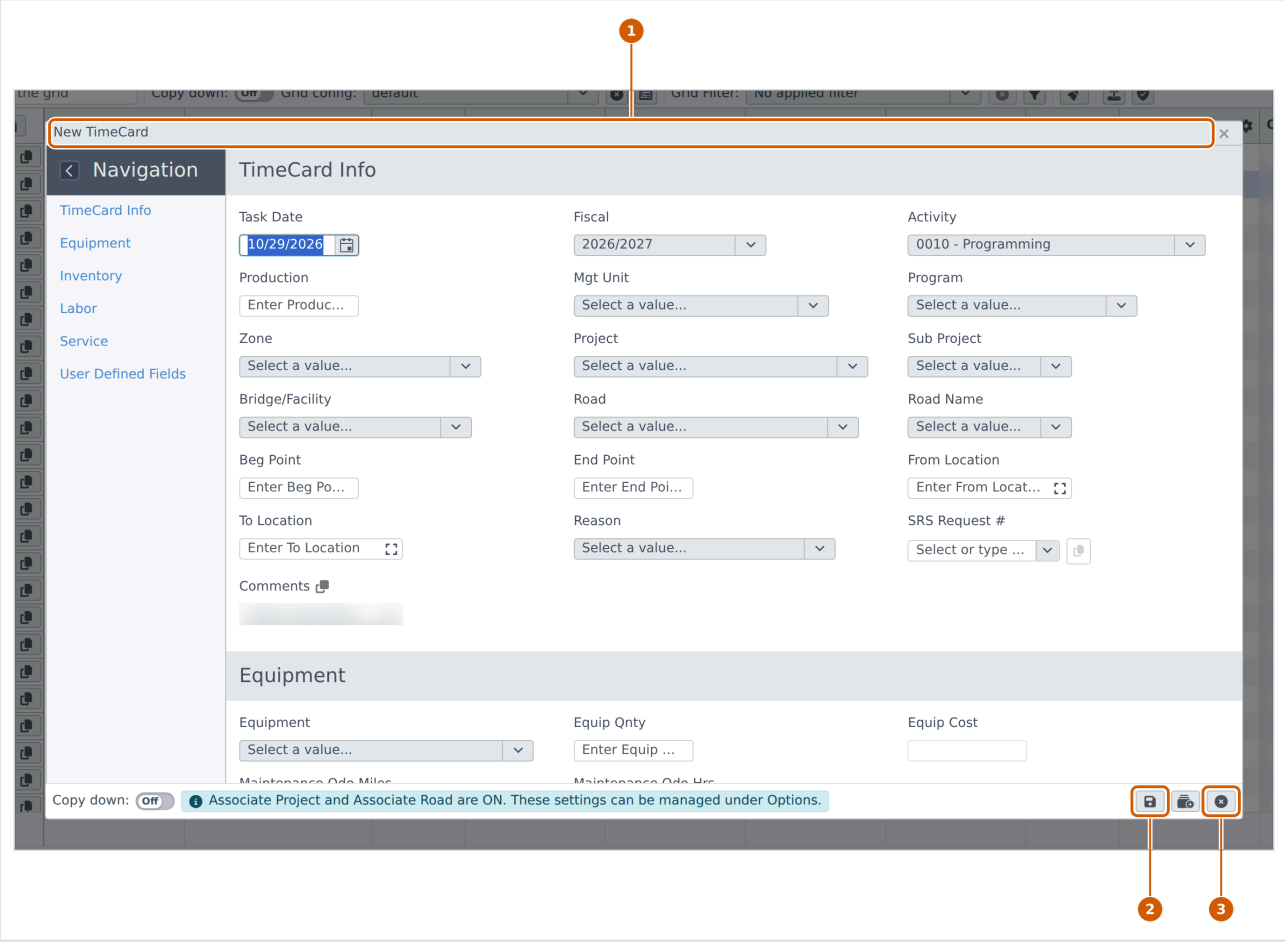
1. Edit TimeCard
2. Save
3. Cancel

2. Change the fields you need. Some fields may be greyed out and cannot be changed.
3. Click **Save** (tooltip "Click to save the current record.") to keep your changes. **Save and Add New** is not offered when editing an existing record.
4. To discard your changes, click **Cancel** (tooltip "Click to cancel the edit operation.") instead of **Save**.

Duplicate a record

1. In the row you want to start from, click the Duplicate button (tooltip "Duplicate record"). A pop-up window titled "New TimeCard" opens, with **Save** and **Cancel** buttons.

> **Note:** The Duplicate button appears only if your security access allows adding records on this screen, and only on screens that include it.



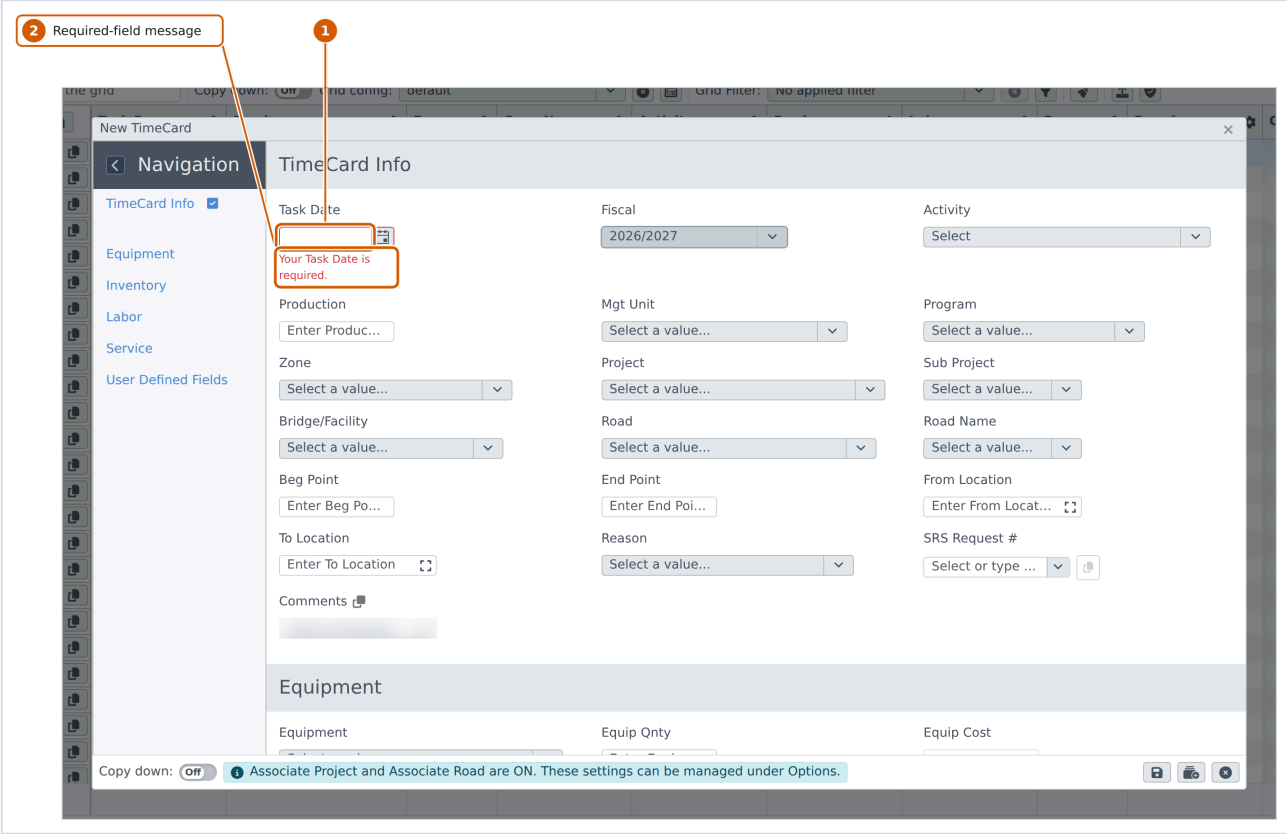
Duplicate record opens a New TimeCard window.

1. New TimeCard
2. Save
3. Cancel

2. Review and change the fields as needed.
3. Click **Save** (tooltip "Click to save the current record.") to create the new record.
4. To discard the new record, click **Cancel** instead of **Save**.

Fix a required-field message

1. Before you start, look for columns whose header is marked as required (on Time Card, **Task Date**).
2. In the pop-up editor, leave a required field empty and move to the next field. The field is marked invalid and a message such as "Your Task Date is required." appears below it.



A required field left empty shows a message below it: "Your Task Date is required."

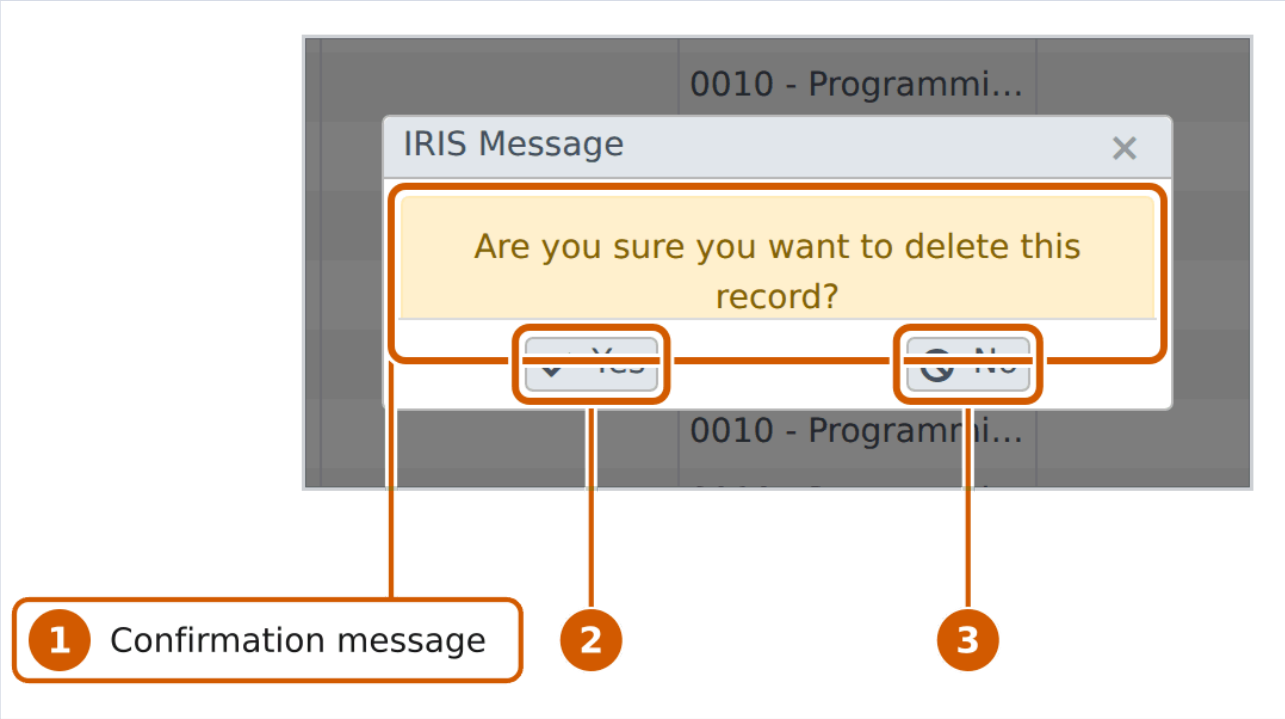
1. Required field left empty
2. Required-field message

3. Enter a value in the field.

Delete a record

1. In the row you want to remove, click the Delete button (trash icon, tooltip "Delete record"). An "IRIS Message" window asks, "Are you sure you want to delete this record?" with **Yes** and **No** buttons.

> **Note:** The Delete button appears only if your security access allows deleting on this screen. Deleting usually needs more access than editing. If you do not see it, ask your administrator.



The IRIS Message window asks you to confirm before a record is deleted.

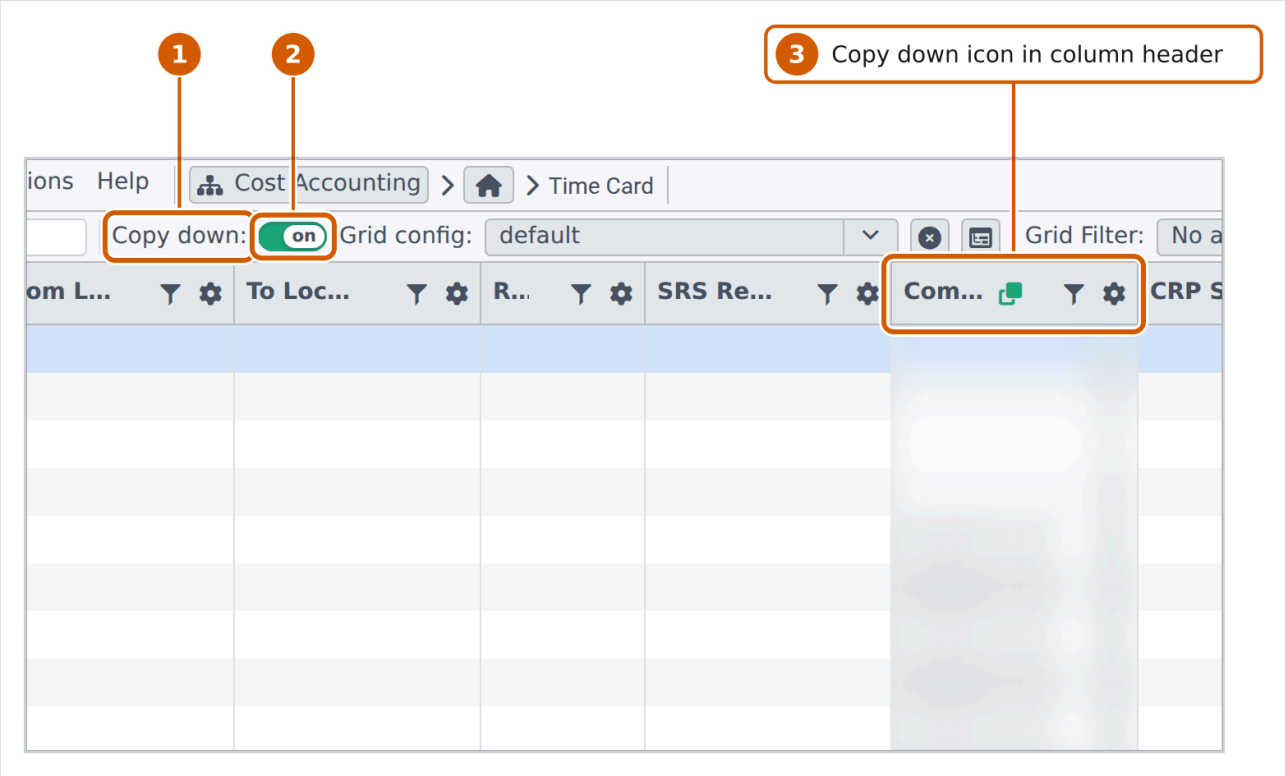
   1. Confirmation message
   2. Yes – delete
   3. No – keep the record
2. Click **Yes** to delete the record.
3. To keep the record, click **No**.

The toolbar also has the **Bulk delete mode** button (tooltip "Click to enter bulk delete mode.").

Use Copy Down to enter a series of similar records

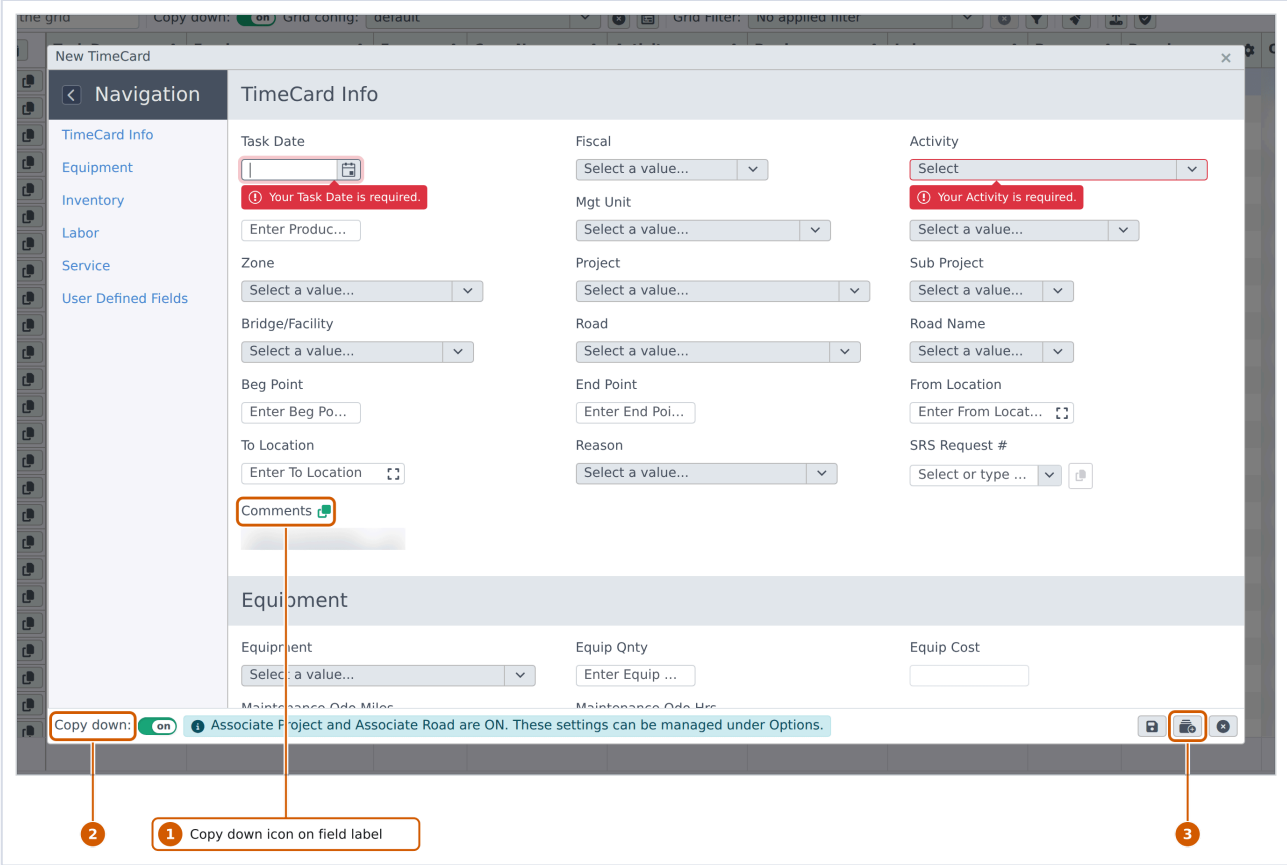
When **Copy down:** is on, adding a new record fills the fields set to Copy down from the selected row, so you only have to make additions or edits to the new record.

1. In the grid toolbar, turn on the **Copy down:** switch. Toggle on the Copy down switch to turn it on; it will turn green to indicate Copy down is active. By default, Copy down is turned off when you start a new IRIS session.



The Copy down switch turned on in the toolbar. The Copy down icon in a column header marks a column that copies.

1. Copy down:
   1. Copy down switch
   2. Copy down icon in column header
2. Click the existing row whose values you want to copy. The row is selected.
3. Click the Add button (tooltip "Add new record. (ctrl shift a)"). The "New TimeCard" window opens. Fields marked with the Copy down icon are filled from the selected row. Other fields start blank or at their usual defaults.



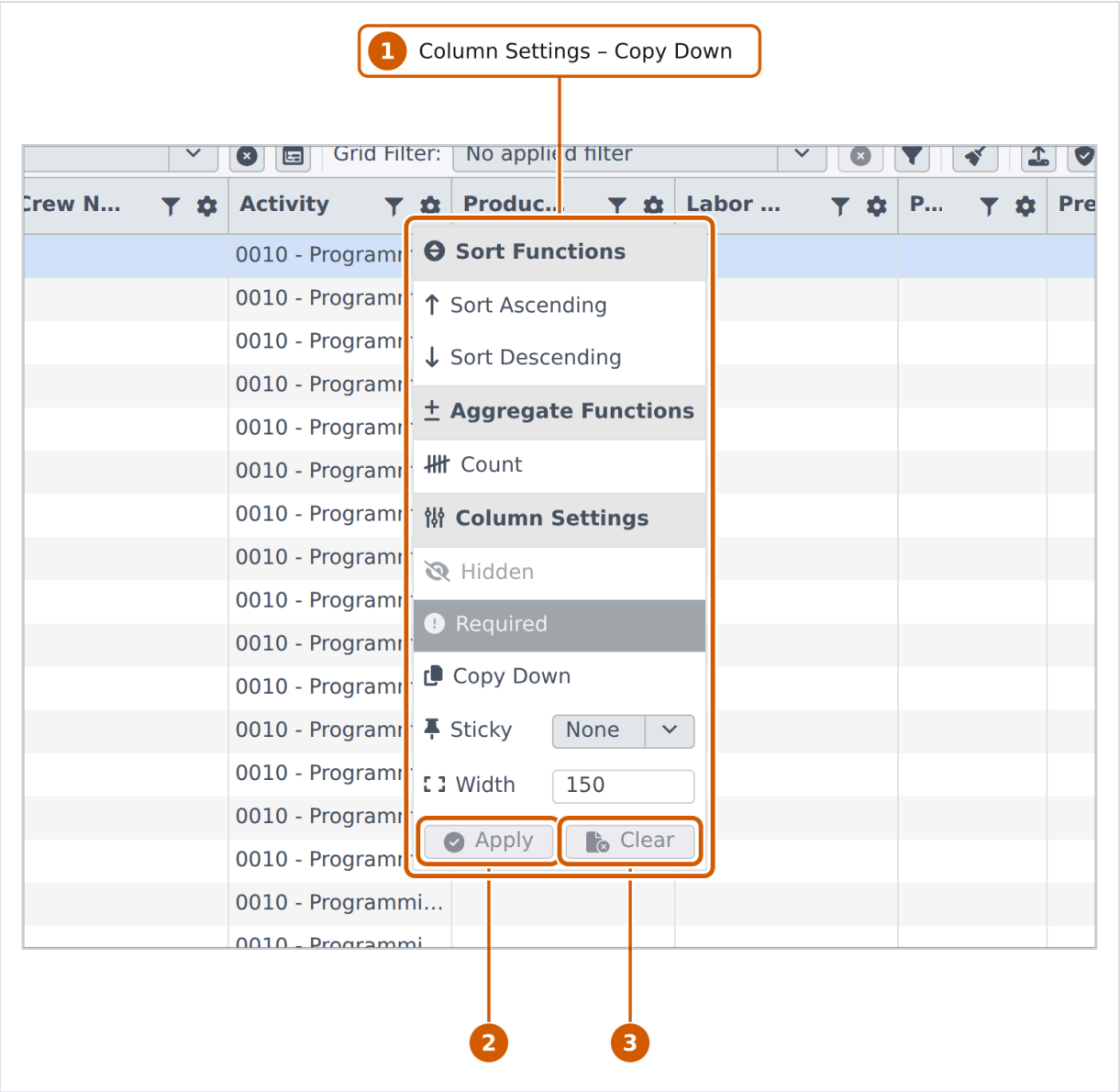
The New TimeCard window opened with Copy Down on. The Copy down icon on a field label marks a field that copies, and the window has its own Copy down switch.

1. Copy down icon on field label
2. Copy down switch in the editor
3. Save and Add New

4. Change only the fields that differ for this record, and fill in any remaining required fields.
5. To enter another similar record straight away, click **Save and Add New**. The record is saved and a new record opens, with the Copy Down fields filled from the record you just saved.
6. When you have entered the last record, click **Save** (tooltip "Click to save the current record.").
7. Turn off the **Copy down:** switch when you no longer want values copied.

Choose which columns Copy Down

1. In the column header, click the column menu icon. The column menu opens with **Sort Functions**, **Aggregate Functions** and **Column Settings** (**Hidden**, **Required**, **Copy Down**, **Sticky**, **Width**), plus **Apply** and **Clear** buttons.



The column menu's Column Settings include Copy Down, used to choose whether the column copies.

1. Column Settings – Copy Down
2. Apply
3. Clear

2. Under **Column Settings**, click **Copy Down** to turn it on or off for this column.

> **Note: Copy Down** is unavailable (greyed out) for locked or read-only columns.

3. Click **Apply** (tooltip "Apply grid configuration."). Columns set to Copy Down show the Copy down icon in their header.
4. To change several columns at once, open the **Grid config editor** from the toolbar and use its **Copy Down** column.
5. Save the configuration. See Grid configurations.

Other editing styles

Some lookup and reference screens edit within the row (inline). The grid filter conditions grid edits cell by cell. New rows appear at the top by default. See Grid filters.

Reference

Grid editing buttons

BUTTON (AS SHOWN)	WHERE	WHAT IT DOES	KEYBOARD SHORTCUT
Add new record. (ctrl+shift+a)	Grid header	Opens a New window for a new record	ctrl+shift+a
Edit record (ctrl+shift+e)	Each row	Opens the Edit window for that row	ctrl+shift+e
Duplicate record	Each row	Opens a New window started from that row	ctrl+shift+d
Delete record	Each row	Asks for confirmation, then deletes the row	ctrl+q
Click to view the cell contents.	Each row	Shows the contents of a cell (may be greyed out)	—
Bulk delete mode	Toolbar	"Click to enter bulk delete mode."	—
Copy down:	Toolbar	Turns Copy Down on or off	—

Pop-up editor buttons

BUTTON	TOOLTIP	WHEN SHOWN
Save	Click to save the current record.	Adding, editing and duplicating
Save and Add New	—	Adding a new record only
Cancel	Click to cancel the edit operation.	Adding, editing and duplicating
Copy down:	On/off switch	Adding a new record only

What Copy Down copies

SITUATION	RESULT
Copy down on, existing row selected, Add clicked	Fields set to Copy Down are filled from the selected row
Copy down on, no row selected	The editor opens empty; no message is shown
Save and Add New	The next new record copies from the record just saved (once); later adds use your selected row again
Duplicate record	Copy Down is not applied
Fields not set to Copy Down	Blank, except checkboxes that are normally ticked for a new record

SITUATION	RESULT
Record ID, created/updated date and user	Never copied
Read-only (system-filled) columns	Cannot be set to Copy Down
Your Default Date	Used only when nothing was copied
Child (nested) grids	A new child record copies from the newest child record of the same parent; the first child has nothing to copy

Tips and notes

Important: Deleting always asks for confirmation in an "IRIS Message" window. Check that you clicked the right row before choosing **Yes**.

Note: If the Add, Edit, Duplicate, or Delete buttons are missing, your security access for that screen does not allow that action. Ask your IRIS10 administrator.

Tip: The **Copy down** icon (tooltip "Copy down") appears after the column title in the grid header and after the field label in the new-record editor. It shows which fields will copy, even when the **Copy down:** switch is off.

Note: Copy Down starts in the off position each time you sign in. Your on/off choice is kept for the rest of the session and is not stored in a saved grid configuration.

Tip: Select the row you want to copy before you click Add. If no row is selected, the new record opens empty and no message is shown.

Note: Hiding a column also turns off its **Copy down** setting, and turning **Copy down** on for a hidden column makes it visible again.

Note: Some screens, such as Audit History, do not have a **Copy down** switch.

Tip: When you change the **Copy down** switch in the new-record editor, the toolbar switch changes too.

Related topics

- Data grid overview and basics
- Grid configurations
- Grid filters
- Navigating portals and pages

Grid configurations

Overview

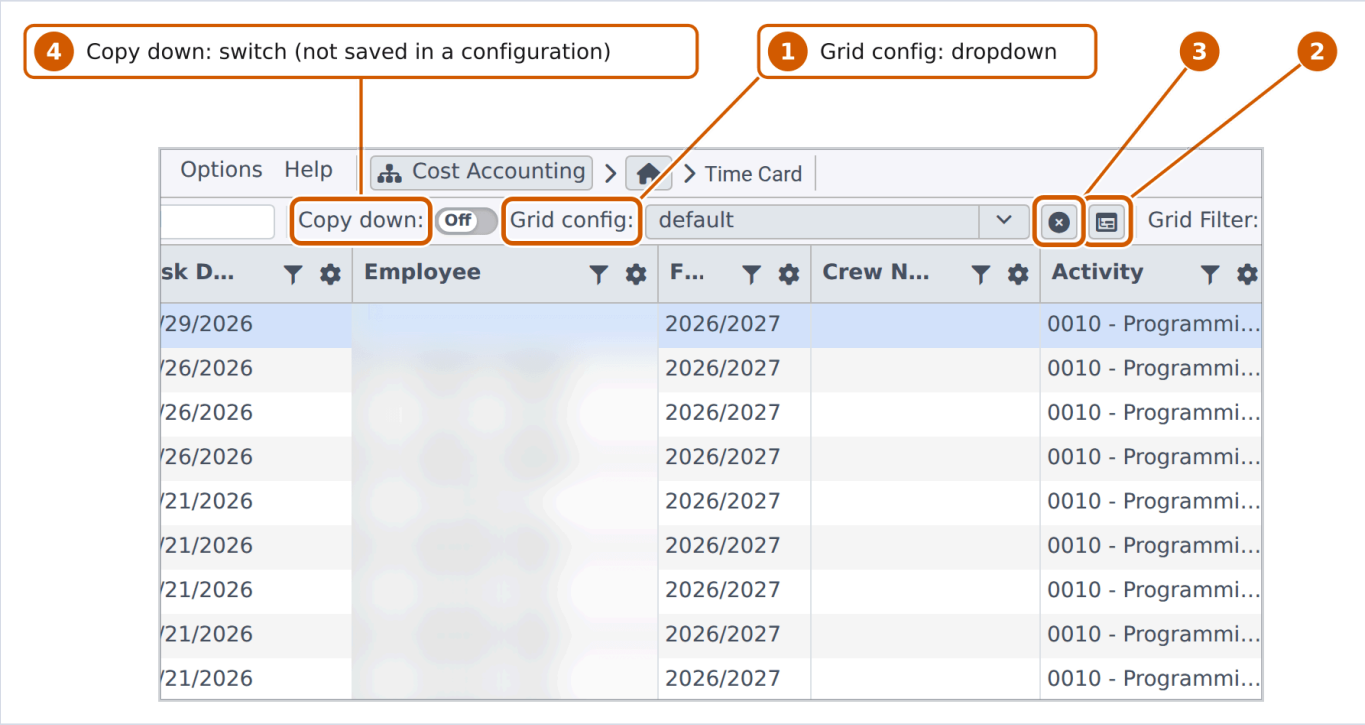
You use a Grid configuration to save a named column layout for one screen. A Grid configuration belongs to one user. Your Grid configuration holds these settings:

- Column order
- Hidden
- Required
- Copy Down
- Sort

Your Grid configuration does not hold filters or page size.

IRIS10 also has a built-in entry named `default`. It is the first entry in the list of configurations.

Three controls on the grid toolbar work with Grid configurations: the **Grid config:** dropdown, the **Grid configuration editor** button and the **Clear grid configuration** button. The **Copy down:** switch next to them is not part of a Grid configuration.



The grid configuration controls on the grid toolbar.

1. Grid config: dropdown
2. Grid configuration editor
3. Clear grid configuration
4. Copy down: switch (not saved in a Grid configuration)

This page shows you how to:

- Switch a grid to one of your saved Grid configurations from the toolbar.
- Open the Grid configuration editor and change which columns are hidden, required, or set to copy down, as well as their order.
- Save your column layout as a named configuration, update it, apply it, and delete it.
- Return a grid to its default layout.
- Copy one user's saved configurations or filters to other users in the same county.

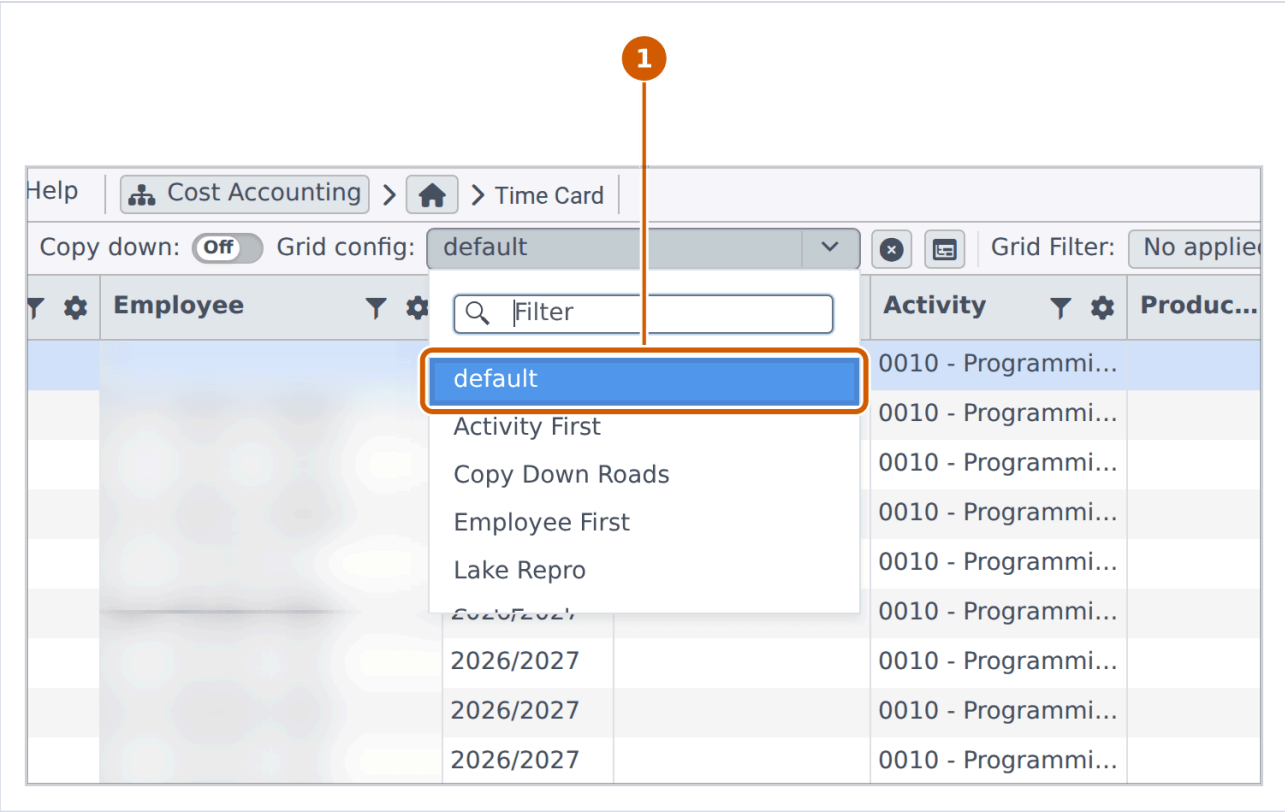
Before you begin

- Sign in to IRIS10.
- Open a screen with a data grid, such as Time Card.
- Make sure you know grid basics: columns, sorting, and the column menu. See Data grid overview and basics.
- To copy configurations to other users, you need access to the **Copy Grid Config** screen. Your administrator grants this access.

Procedure

Switch the grid to a saved configuration

1. On the grid's toolbar, find the **Grid config** label and click the dropdown next to it.
   A list opens, showing `default` first, followed by your saved configurations for this screen, plus a box with the placeholder `Filter`.



Open the 'Grid config:' dropdown and pick a configuration to apply it immediately.

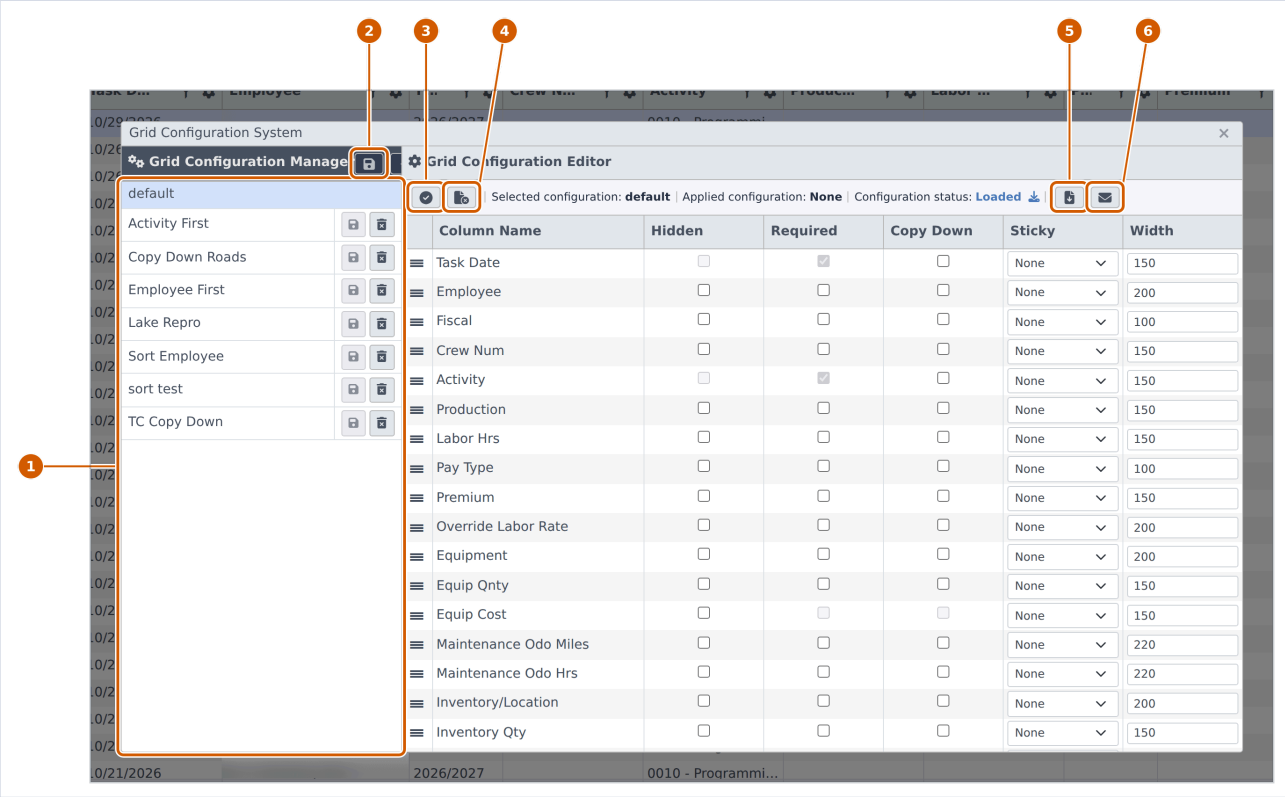
1. 'default' and your saved configurations
2. Optional: to narrow a long list, type part of the name into the **Filter** box.
3. Click the configuration you want. The configuration is applied to the grid.
4. If you have unsaved changes, IRIS10 asks, "Changing grid configs will discard unsaved changes. Would you like to save them now?" Click **Save** to keep them.

   The new configuration loads.
5. Alternatively, click **Discard** to drop the unsaved changes. The new configuration loads.

Open the Grid configuration editor

1. On the grid toolbar, click **Grid configuration editor**.

   The **Grid Configuration System** window opens. It lists `default` and your saved configurations for this screen, and shows a table of columns headed **Column Name**, **Hidden**, **Required**, **Copy Down**, **Sticky** and **Width**.



The Grid Configuration System window: your configurations on the left and column settings on the right.

1. Saved configurations
2. Save grid configuration
3. Apply grid configuration
4. Clear grid configuration
5. Export
6. Email to IRIS support

2. Check the status shown in the editor. It reads Loaded, Unsaved or Saved.

   When a configuration has unsaved changes, `(unsaved)` appears in red after its name.

3. On a screen that has a child grid, use the editor's parent/child toggle to pick which grid's columns you are editing.

   The column table switches to the selected grid. One saved configuration holds the settings for both grids.

Change column settings in the editor

1. Drag a column row up or down by its drag handle to change the column order.

   The status changes to **Unsaved**.

2. Check or clear **Hidden** to hide or show a column.

   Turning **Hidden** on also clears that column's **Copy Down** setting.

3. Check or clear **Required** to mark whether the column is required.

4. Check or clear **Copy Down** to choose whether the column's value is carried into new records when the **Copy down** switch is on.

Turning **Copy Down** on also un-hides the column.

> **Note:** You can't turn on **Copy Down** for read-only columns.

Save the current layout as a new named configuration

1. In the **Grid Configuration System** window, type a name for the configuration. The name must be unique on this screen, must not be empty and must not be `default`.
2. Click the "Save grid configuration" button.

   The new configuration appears in the list and in the toolbar's **Grid config** dropdown. If the name is empty, a duplicate or `default`, a message tells you to change it. See Messages you may see when managing configurations.

Update an existing configuration

1. In the editor list, select the configuration you want to change.
2. Change its column settings.

   The status changes to Unsaved.
3. Click the save button on that configuration's row. The button stays unavailable until there is something to save.

   The status changes to Saved. If the configuration was changed somewhere else after you opened it, the save is refused and you are asked to re-apply your changes to the latest version.

Apply a configuration from the editor

1. In the editor list, select the configuration.
2. Click the "Apply grid configuration" button.

   The window closes and the grid reloads with the configuration. Any unsaved edits are applied as a temporary `unsaved` layout and are not stored under a name.

Delete a configuration

1. In the editor list, click the delete button on the configuration's row.

   IRIS10 asks "Delete grid configuration?"

   > **Note:** The `default` row has no delete button.
2. Click **Yes** to delete the configuration.

   If you deleted the configuration that was applied, the toolbar dropdown switches back to `default`.
3. Alternatively, click **No** to keep the configuration.

Return the grid to its default layout

1. On the grid toolbar, click **Clear grid configuration**.

   The grid resets to the default configuration.
2. Alternatively, click the "Clear grid configuration." button in the editor.

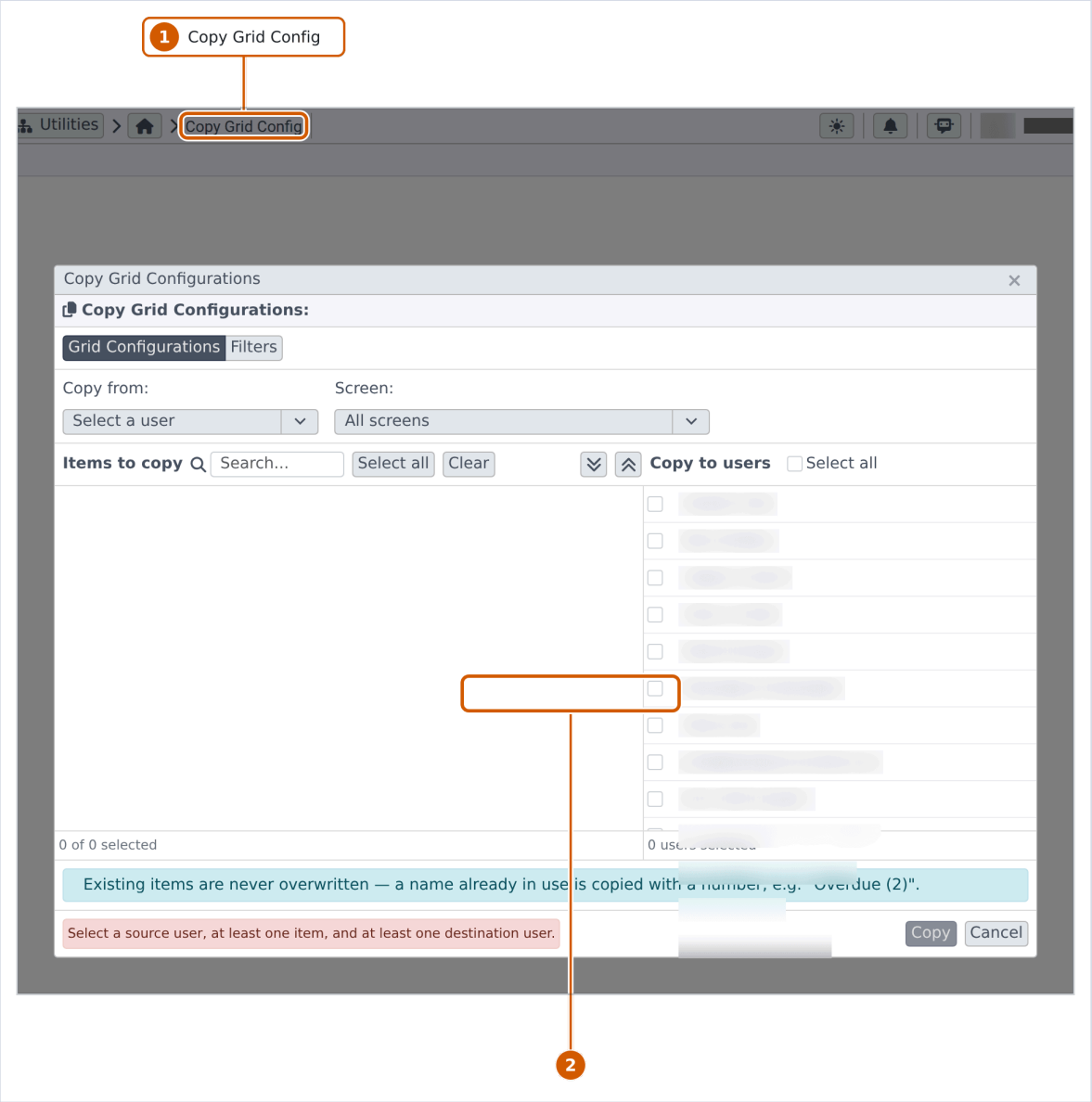
   The grid resets to the default configuration.

Copy saved configurations or filters to other users

1. Open the **Copy Grid Config** screen in the Utilities portal. See Navigating portals and pages.

   The screen header reads **Copy Grid Config**. The screen explains that it copies one user's saved grid layouts, or their saved grid filters, to other users in this county.

   > **Note:** Only users who have been given access to this screen can open it. Anyone else sees "You do not have access to Copy Grid Configurations." Ask your IRIS10 administrator if you need access.



The Copy Grid Config screen copies one user's saved layouts or filters to other users in the county.

1. Copy Grid Config
2. Copy Grid Configurations

2. Click **Copy Grid Configurations**.

   The copy window opens.

3. Choose the mode. **Grid Configurations** copies saved grid layouts, and **Filters** copies saved grid filters.

   In Filters mode the title changes to **Copy Grid Filters**. Your source and destination choices are kept when you switch modes.

4. In the source-user dropdown, choose the user whose items you want to copy.
5. In the screen dropdown, choose the screen the items belong to.
6. Select the items to copy, or click **Select all**. Click **Clear** to start the selection again.

> **Note:** Select at least one item. Otherwise the copy is refused.

7. In the **Copy to users** list, choose one or more destination users. They must be different from the source user.
8. Run the copy.

   The items are added to each destination user and become theirs. Nothing the destination users already have is overwritten. If a name was already in use, the copy is saved under a numbered name such as `Overdue (2)`, and a warning lists each `old -> new` name.

Reference

Grid configuration controls on the toolbar

ON-SCREEN LABEL	WHAT IT DOES
Grid config (dropdown)	Lists `default` and your saved configurations for this screen. Picking one applies it immediately.
Grid configuration editor	Opens the **Grid Configuration System** window (tooltip: "Click to open grid configuration editor.").
Clear grid configuration	Resets the grid to the default configuration (tooltip: "Click to clear grid configuration").

Buttons in the Grid Configuration System window

TOOLTIP	WHAT IT DOES
Save grid configuration	Saves the current column layout as a new named configuration.
Hide grid configuration manager	Hides the list of configurations.
(row) save	Saves changes to that configuration. Not shown on `default`
(row) delete	Deletes that configuration after you confirm. Not shown on `default`
Apply grid configuration	Closes the window and reloads the grid with the selected configuration
Clear grid configuration	Resets the grid to the default configuration.
Click to export the current grid configuration as a JSON file	Downloads the current configuration as a file
Click to email the grid configuration to IRIS support	Sends the configuration to IRIS support, for example when you report a problem

Column settings you can save in a configuration

SETTING	MEANING
Column order	The order of columns, set by dragging rows in the editor
Hidden	Hides the column. Turning it on clears Copy Down for that column
Required	Marks the column as required
Copy Down	The column's value is carried into new records when the **Copy down** switch is on. Turning it on un-hides the column. Not available for read-only columns
Sort	The saved sort order of columns

Messages you may see when managing configurations

MESSAGE	CAUSE	WHAT TO DO
Please give the grid configuration a unique name	You already have a configuration with that name on this screen	Choose a different name
Filter name must not be empty	You entered no name. The message says "filter," but it applies to Grid configurations.	Type a name
Cannot overwrite default filter	IRIS10 reserves the name `default` in any letter case.	Choose a different name
Changing grid configs will discard unsaved changes. Would you like to save them now?	You picked another configuration while you had unsaved changes	Click **Save** to keep the changes, or **Discard** to drop them
Delete grid configuration?	You clicked a row's delete button	Click **Yes** to delete, or **No** to keep it

Messages you may see when copying

MESSAGE	MEANING
You do not have access to Copy Grid Configurations	Your account has not been given access to this screen. Ask your administrator
Source and destination user must be different.	Choose a destination user other than the source user
Grid Configuration List must contain at least one configuration to copy	Select at least one item
Destination user is not a member of this tenant	You can only copy to users in the county you are signed in to
You can not affect a tenant you are not logged into	You can only copy within the county you are signed in to
No grid configurations were found for the source user in this tenant with that criteria to copy	None of the selected items belong to the source user. Nothing was copied

MESSAGE	MEANING
N of the M selected configurations were not copied because they do not belong to the source user in this tenant	Warning: some selected items were skipped. The rest were copied
These layouts were copied under a new name, because the destination user already had that name or because the name is reserved	Warning: the listed layouts were copied under new, numbered names, shown as `old -> new`

Tips and notes

Note: Grid configurations are personal and belong to one screen. Each user keeps their own list for each screen, and names must be unique within that list.

Important: A Grid configuration doesn't save filters or page size. Use the **Grid Filter** dropdown to save and reuse filters. See Grid filters.

Note: The **Copy down:** on/off switch on the toolbar is not part of a Grid configuration. IRIS10 keeps it for your current session only, and it starts in the off position for each new session. The per-column **Copy Down** setting is part of the Grid configuration.

Note: `default` is a built-in entry. You can't save over it, rename it, or delete it, and you can't give a configuration that name.

Tip: On screens with a child grid, one named configuration saves both the parent and child column settings. Use the editor's parent/child toggle to switch between them.

Tip: Copying never overwrites anything the destination user already has. An exisiting name gets a number added, such as `Overdue (2)`. In Filters mode, a copied filter is never set as the destination user's default filter.

Note: Copied layouts belong to the destination user, who can change or delete them like their own.

Related topics

- Data grid overview and basics
- Grid filters
- Grid viewing and editing
- Navigating portals and pages

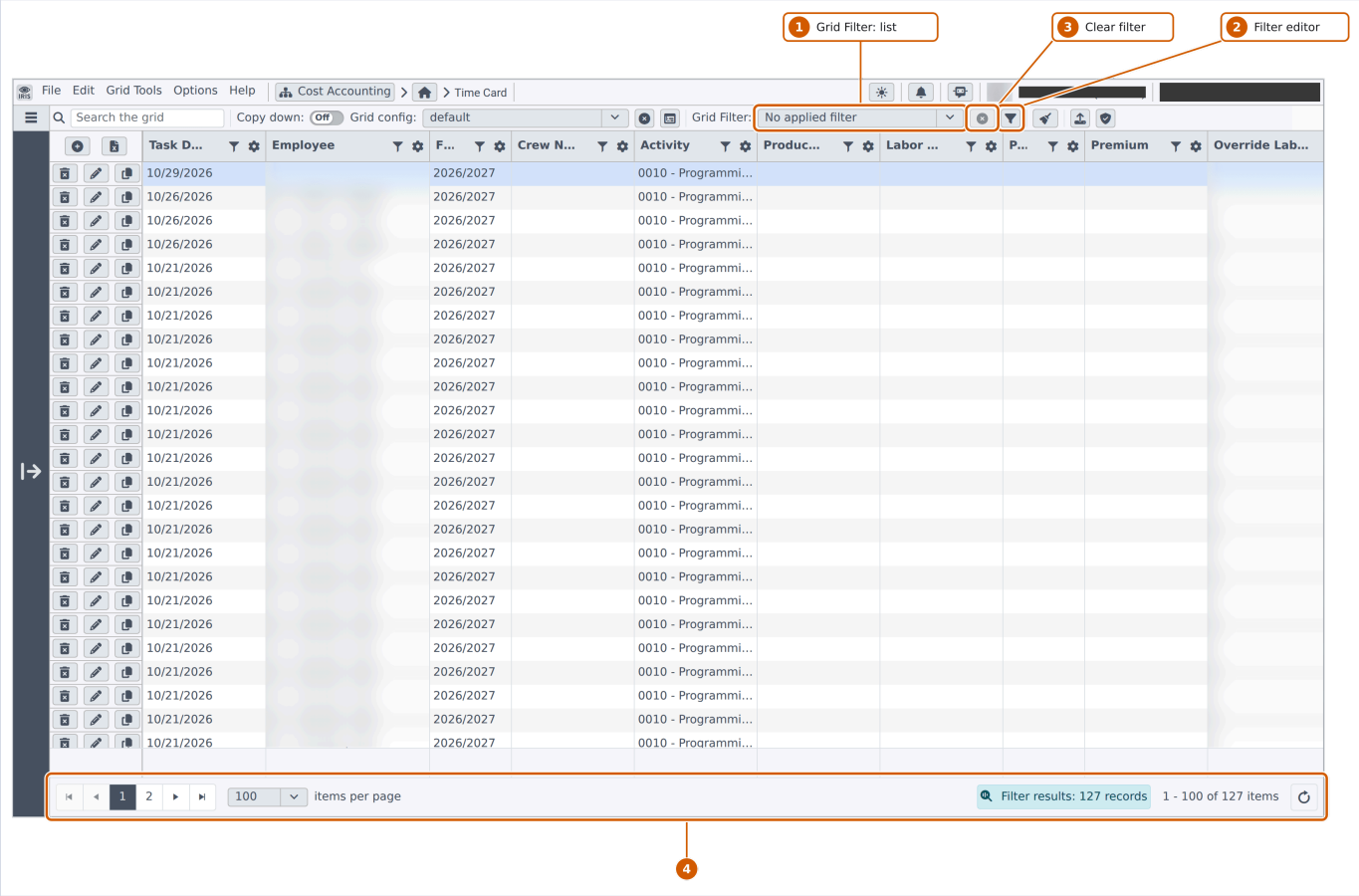
Grid filters

Overview

You can narrow a grid to the records you need in three ways:

- Choose a saved filter from the **Grid Filter** list on the grid toolbar.
- Filter on one column from its column header.
- Build a multi-condition filter in the filter editor window, check it and apply it.

The examples on this page use the Time Card grid. The grid toolbar has the **Grid Filter** list, the **Filter editor** button, and the **Clear filter** button. The pager shows **Filter results** with the number of records the current filter returned.



Filter controls on the grid toolbar and the filter result count in the pager.

1. **Grid Filter list**
2. **Filter editor**
3. **Clear filter**
4. **Filter results count**

Before you begin

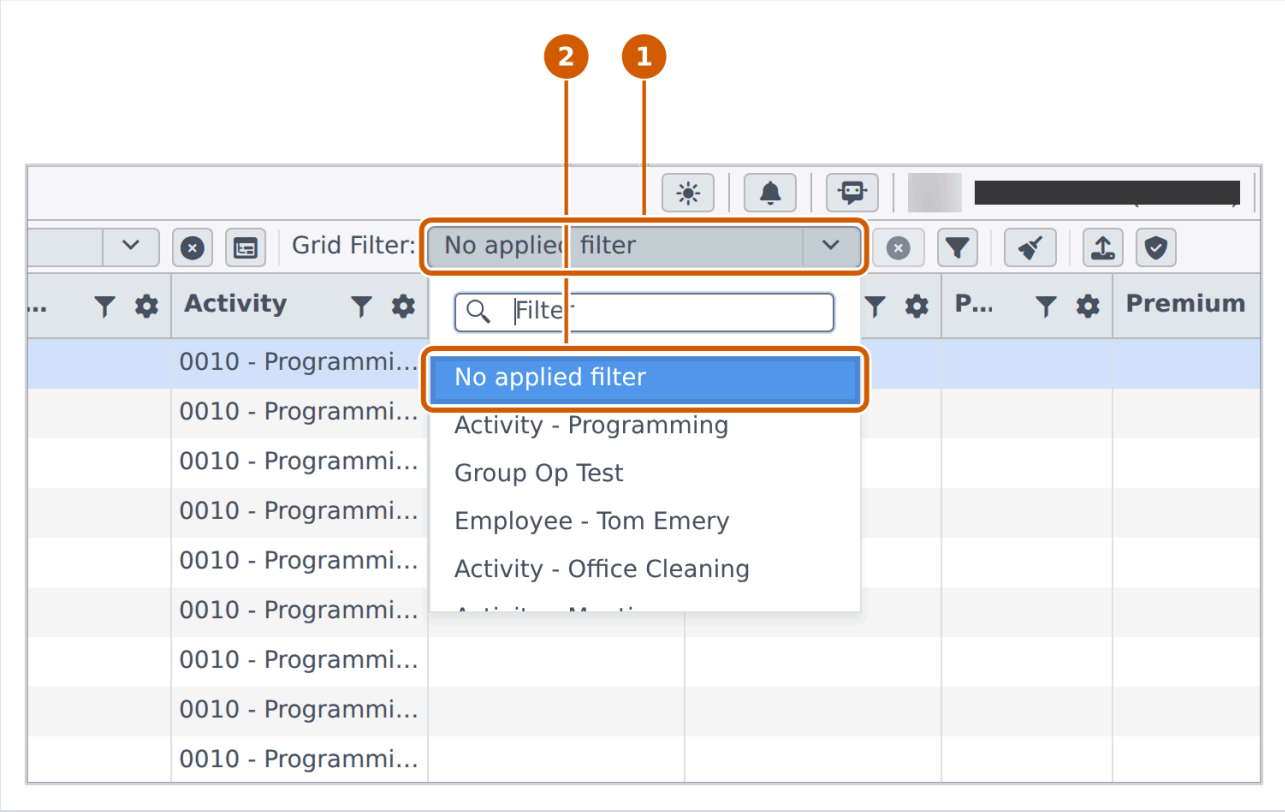
- Sign in to IRIS10.
- Know the shared data grid: columns, paging, search and sorting. See Data grid overview and basics.

Procedure

Apply a saved filter

1. On the grid toolbar, next to **Grid Filter**, click the filter list.

   The list opens with a **Filter** search box at the top, **No applied filter** as the first item, then your saved filters.



The Grid Filter: list, with a search box, No applied filter and your saved filters.

   1. **Filter search box**
   2. **No applied filter and saved filters**

2. (Optional) Type part of a filter name in the **Filter** box.

   The list shortens.

3. Click the name of the filter you want.

   The grid reloads with the filter applied. IRIS10 remembers this choice and applies the same filter the next time you open this screen.

Clear the applied filter

1. On the grid toolbar, click **Clear filter** (tooltip "Click to clear applied grid filter").

   The grid removes the filter, and the screen no longer opens with your previously chosen saved filter.

   > **Note:** On Time Card, **Clear filter** can be greyed out and unavailable.

   To clear the filter from the list instead, use steps 2 and 3.
2. Open the **Grid Filter:** list.

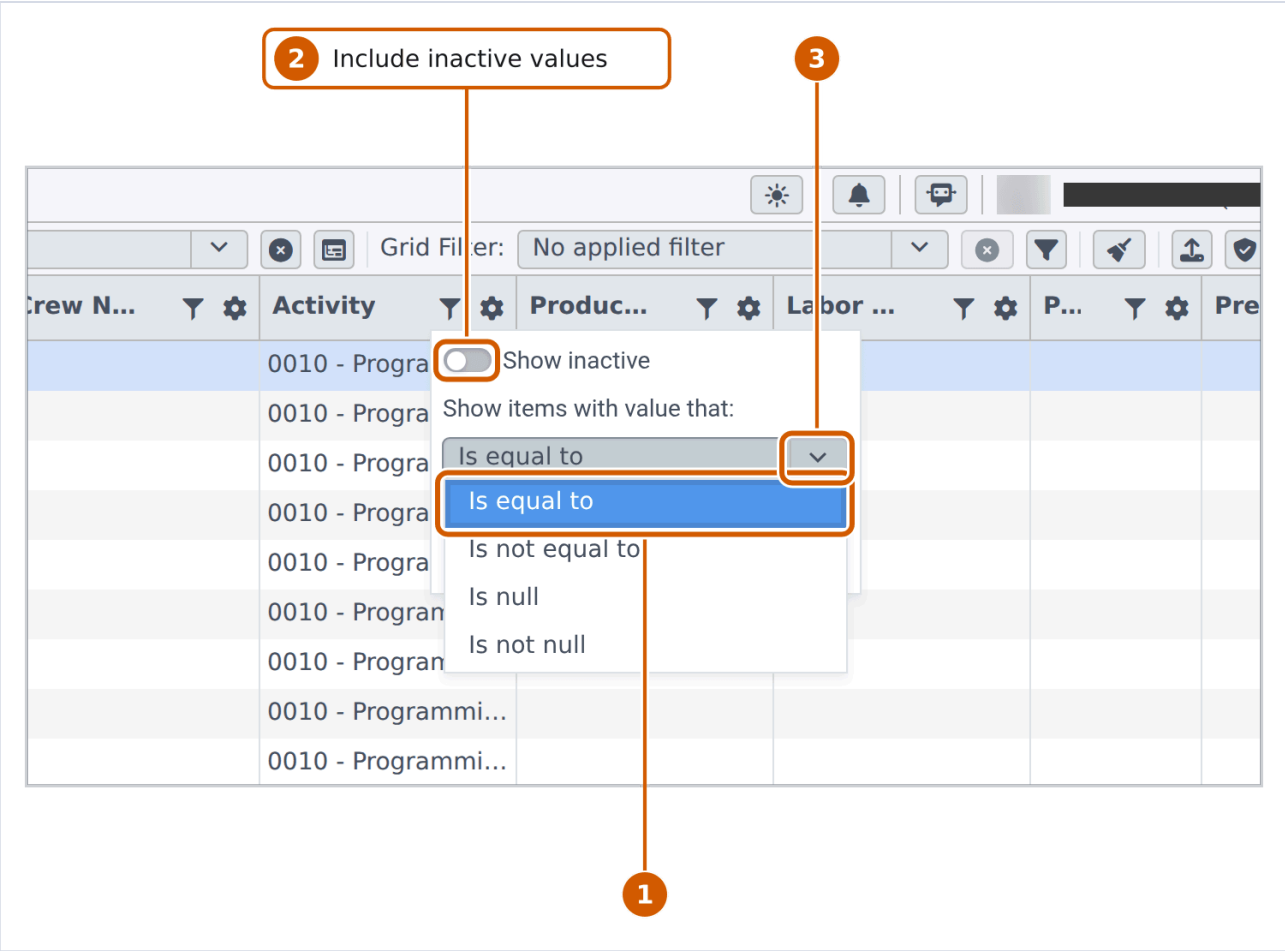
   The list opens.
3. Click **No applied filter**.

   The grid clears the filter.

Filter on one column from its header

1. In the column header, click the filter icon for the column you want to filter (for example, **Activity**).

   A filter menu opens with the text "Show items with value that", an operator list, a value list, and **Filter**, and **Clear** buttons.



Column filter menu for Activity with the operator list open.

1. **Operators**
2. **Include inactive values**
3. **Filter and Clear**

2. Open the **Operator** list.

   The list shows the operators for the column.

3. Choose an operator, such as **Is equal to**, **Is not equal to**, **Is null**, or **Is not null**.

   The menu selects the operator. The operators offered depend on the column. The **Activity** column offers **Is equal to**, **Is not equal to**, **Is null**, and **Is not null**.

4. To include inactive values in the value list, turn on the switch with tooltip "Include inactive values in this list."

   The value list includes inactive values. The switch is off by default.

5. Choose the value to filter on.
6. Click **Filter**.

   The grid shows only rows matching the condition.

7. To remove the column filter, open the menu again.

   The filter menu opens.

8. Click **Clear**.

The column filter is removed.

Build and apply a filter in the filter editor

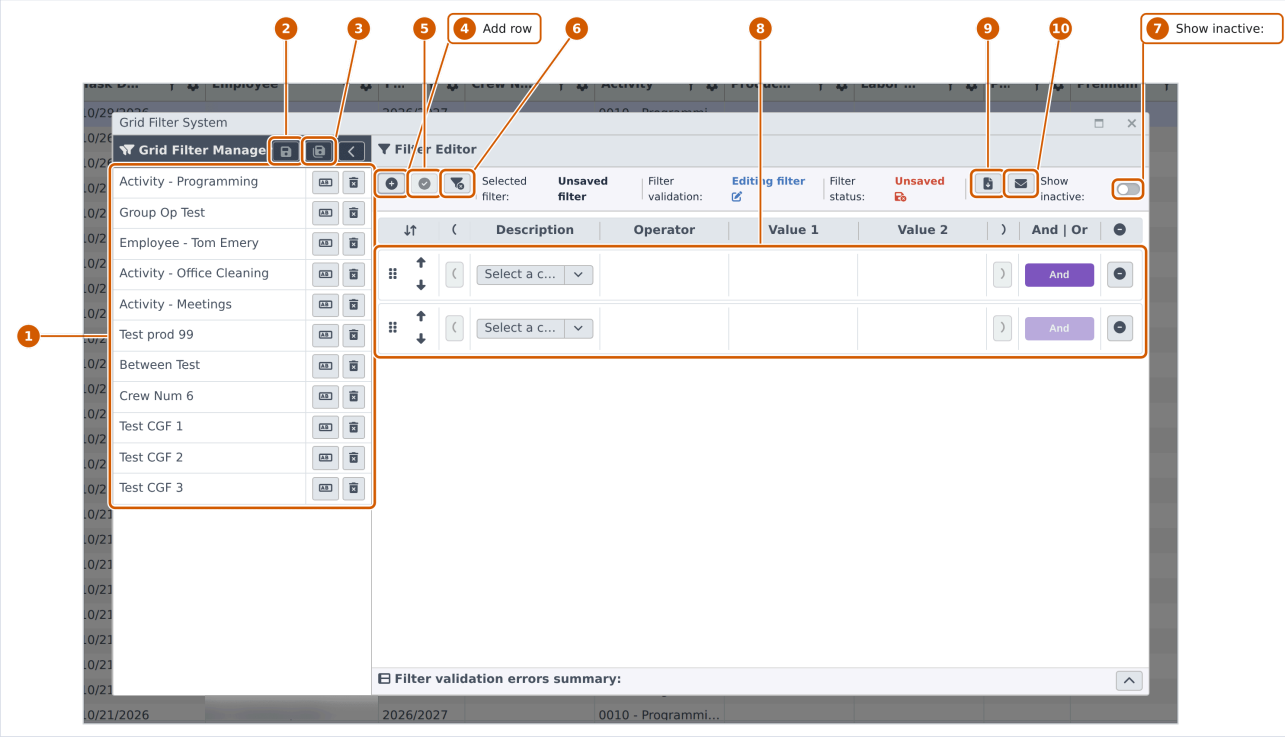
1. On the grid toolbar, click **Filter editor** (tooltip "Click to open grid filter editor").

   A window opens with your saved filters listed on the left and the **Filter editor** on the right.
2. If the screen has a child grid, under **Target grid**, click **Parent** or **Child** to choose which grid you are filtering.

   > **Note: Target grid:** appears only on screens with a child grid.

3. Click the add row button (tooltip "Click to add a filter row").

   A new condition row appears showing "Select a column..." An empty editor shows "Filter empty. Add a row to get started."



The filter editor window: your saved filters on the left, a new condition row in the editor on the right.

1. **Your saved filters**
2. **Save**
3. **Save As**
4. **Add row**
5. **Apply**
6. **Clear**
7. **Show inactive**
8. **Condition row**
9. **Export**
10. **Email to IRIS support**

4. In the **Description** column of the row, select the grid column to filter on.
5. In the **Operator** column, choose the comparison.
6. Enter **Value 1**.

   When you apply the filter, the grid ignores a row that has an operator but no value (other than `IS NULL` or `IS NOT NULL`).
7. For a **Between** comparison, enter **Value 2**.

   When you apply the filter, the grid ignores a **Between** row that is missing a value.
8. To include inactive values in the value lists, turn on **Show inactive:**.

   Inactive values appear in the editor's value lists. The switch is off by default.
9. To add another condition, click the add row button again.

   A new condition row appears.
10. In the **And | Or** column of the earlier row, choose **And** or **Or**.

    If you leave **And | Or** blank, IRIS10 uses And.
11. To group conditions, set an open parenthesis on the first row of the group.
12. Set a close parenthesis on the last row of the group.

    Every open parenthesis needs a matching close parenthesis. Otherwise, validation reports the groups as unbalanced.
13. To remove a condition, click the delete button at the end of its row.

    The editor removes the row.
14. Check the **Filter validation:** indicator and the validation results panel.

    The panel shows "Good news. No filter validation errors found" when the filter is valid. An OR-grouping warning still lets the filter apply. You must fix an unbalanced-group error first.
15. Click the apply button (tooltip "Click to apply the current filter.").

    The grid shows only matching rows. The pager shows the count after **Filter results:**. If you apply an empty filter, the grid clears its filter.
16. To start over, click the clear button (tooltip "Click to clear the current filter").

    The editor clears its filter.

Save a new filter

1. Build the filter in the **Filter editor** as described in "Build and apply a filter in the filter editor."
2. Click **Save As** (tooltip "Click to save a copy of the current filter").

   A window asks you to "Enter the name of your filter."
3. Type a name.
4. Confirm the name.

   The filter appears in your saved filter list.

   > **Note:** The name cannot be blank, cannot be `Default` in any letter case, and must differ from your other filter names on this screen, ignoring letter case.

Change a saved filter

1. In the filter editor window, click the saved filter in the left-hand list.

   Its conditions load into the **Filter editor** and **Selected filter:** shows its name. The list contains only filters you created for this screen.
2. Change the conditions.
3. Click **Save** (tooltip "Click to save the current filter").

   IRIS10 replaces the saved filter's conditions with the ones now in the editor.

Rename a saved filter

1. In the filter editor window, click the rename button on the filter's row in the list.

   If the filter has unsaved edits, the prompt "Save current edited filter?" appears with **Save** and **Cancel**.
2. Type the new name.
3. Confirm the name.

   A blank name shows "Filter name must not be empty."

Delete a saved filter

1. In the filter editor window, click the delete button on the filter's row in the list.

   IRIS10 removes the filter and all its conditions. If this screen was set to open with that filter, it no longer does.

Export or send a filter to IRIS support

1. In the filter editor window, click the export button.

   IRIS10 downloads the current filter as a file.
2. Alternatively, click the email button (tooltip "Click to email the filter to IRIS support").

   IRIS10 sends the filter to IRIS support.

Reference

Grid toolbar filter controls

CONTROL	WHAT IT DOES
Grid Filter: list	Shows saved filters for this screen. Includes a **Filter** search box and **No applied filter** as the first item.
Filter editor	Opens the filter editor window (tooltip "Click to open grid filter editor").
Clear filter	Clears the applied grid filter (tooltip "Click to clear applied grid filter").
Filter results: (in pager)	Shows how many records the current filter returned.

Filter editor buttons and indicators

CONTROL (TOOLTIP)	PURPOSE
Save ("Click to save the current filter")	Saves changes to the selected saved filter.
Save As ("Click to save a copy of the current filter")	Saves the current filter under a new name.
Hide filter manager ("Click to hide filter manager")	Hides the saved filter list.
Rename / Delete (per saved filter)	Renames or deletes that saved filter.
Add row ("Click to add a filter row")	Adds a condition row.
Apply ("Click to apply the current filter")	Applies the editor's filter to the grid.
Clear ("Click to clear the current filter")	Clears the editor's filter.
Export	Downloads the current filter as a file.
Email ("Click to email the filter to IRIS support")	Sends the filter to IRIS support.
Show inactive: ("Include inactive values in the filter value lists.")	Adds inactive values to the value lists
Target grid: Parent / **Child**	Chooses which grid to filter; shown only on screens with a child grid.
Selected filter / **Filter validation** / **Filter status**	Show the loaded filter, validation result and status.

Filter editor row columns

COLUMN	USE
Open parenthesis	Starts a group of conditions.
Description	Grid column to filter on ("Select a column...").
Operator	Comparison to use.
Value 1	Value to compare against.
Value 2	Second value, used by **Between**.
Close parenthesis	Ends a group of conditions.
And \Or	How this row joins the next row; blank means **And**.
Delete	Removes the row.

Which filter a screen opens with (highest first)

ORDER	SOURCE
1	A screen link you followed. Applies to that visit only and does not change your saved filter.
2	The filter already in use when you return to a screen during your session.
3	The saved filter you last chose from the **Grid Filter:** list.
4	The screen's built-in default filter, if it has one.

ORDER	SOURCE
5	No filter

Built-in screen default filters

DEFAULT FILTER	APPLIES TO	SHOWS
Active + Active Road	Screens with both an Active and an Active Road column	Active records on active roads
Active	Screens with an Active column	Active records
Last 2 Years	Transaction screens with a task date; inventory transaction screens on inventory date	Records from the last two years (keeps large screens fast)
Unposted	Inventory Transfer	Transfers not yet posted
Not Posted to Timecard	Fuel Import Stage	Fuel records not yet posted to time cards
Active Road / Active Location / Active Employee	Screens with those columns	Active roads, locations or employees
Active Equipment	Edit Last PM list	Active equipment
Open Payments	Payment screens	Payments that are not complete, canceled or deleted

Filter messages

MESSAGE	MEANING / WHAT TO DO
`Filter empty. Add a row to get started.`	The editor has no rows; click the add row button.
`Good news. No filter validation errors found.`	The filter is valid.
`One or more group operators are unbalanced. Please correct them to validate the filter.`	Match every open parenthesis with a close parenthesis.
`Filter name must not be empty.`	Type a name before saving.
`Can not create a user filter with the name "Default".`	Choose a different name.
`No Custom Filters Available` / `You have no saved custom filters. Begin by creating a custom filter.`	You have no saved filters for this screen yet.
`Filter cleared and applied.`	An empty filter was applied, so the grid is unfiltered.
`The screen link filter was not applied. The link has expired. Open it again from the screen that made it.`	Go back to the original screen and open the link again.

MESSAGE	MEANING / WHAT TO DO
`The screen link has no filter.` / `The screen link has more than 10 rows.` / `The screen link name is longer than 60 characters.` / `The screen link has a group that it does not close.`	The link was rejected; the screen opens without that filter.
`You do not have access to Copy Grid Configurations.`	Ask your administrator for access to copy filters to other users.
`Source and destination user must be different.` / `Destination user is not a member of this tenant.`	Pick a different destination user when copying filters.
`These filters were copied under a new name, because the destination user already had that name or because the name is reserved: ...`	The listed copied filters were renamed for the destination user.

Screen link limits

A Screen link is a link from another screen that opens this grid with a filter already applied, for that visit only.

RULE	LIMIT
Rows	Up to 10
Name	Up to 60 characters; default name `Screen link`
Operators	`=`, `<>`, `>`, `>=`, `<`, `<=`, `Between`, `Contains`, `Not Contains`, `Starts With`, `Ends With`, `Not Starts With`, `Not Ends With`, `IS NULL`, `IS NOT NULL`
Values	Cannot contain `"`, `[`, `]`, `(`, `)` or `;`; dates as `MM/dd/yyyy` or `yyyy-MM-dd`; `Between` needs Value 2; `IS NULL` takes no value
Grouping	At most one parenthesis per row; groups must be closed

Tips and notes

> **Important:** Clicking **Clear filter** also stops the screen from reopening with your chosen saved filter. Choose a saved filter again to make it your screen's filter.

> **Note:** Saved filters are personal. Each user's list shows only the filters that user created for that screen, and filters are kept separate for each organisation you sign in to.

> **Note:** Saved filters are separate from grid configurations. Saving a filter does not save column layout, and choosing a grid configuration does not change your filter. See Grid configurations.

> **Tip:** A filter you saved earlier takes priority over the screen's built-in default.

> **Tip:** Rows with an operator but no value (except `IS NULL` / `IS NOT NULL`) and **Between** rows missing a value are skipped without a warning. If your results look too broad, check that every row has its values.

> **Note:** A warning about OR grouping does not block the filter; it still applies. Check that the results are what you expect.

> **Note:** IRIS10 sets built-in screen defaults from the screen's columns. You cannot rename, delete, or modify them.

> **Note:** Following a screen link applies its filter for that visit only; your saved filter for the screen does not change.

> **Tip:** If IRIS support asks for your filter, use the email button in the filter editor, or export the filter as a file.

Related topics

- Data grid overview and basics
- Grid configurations
- Grid viewing and editing

Lookup values

Overview

Lookup values are the entries that IRIS10 offers in pick lists on other screens, such as departments, inventory locations or zones. Each value has a Name and a Description. Some values are system data supplied with IRIS10.

On the Lookup Values screen, you choose a lookup table, view its values, see where the table is used, and add, duplicate, edit or delete values. In the Cost Accounting portal, you can also open lookup values in a window from the Inventory, RBF and Activity screens.

Before you begin

- Sign in to IRIS10.
- Know how to switch portals and open drawer menu items. See Navigating portals and pages.
- Know how to use the shared data grid. See Data grid overview and basics.
- To add, edit, duplicate or export values, you need access level 2 - Read/Write or higher on the screen. Deleting needs a higher level. See Security Administration: access levels by user.

Procedure

Open the Lookup Values screen

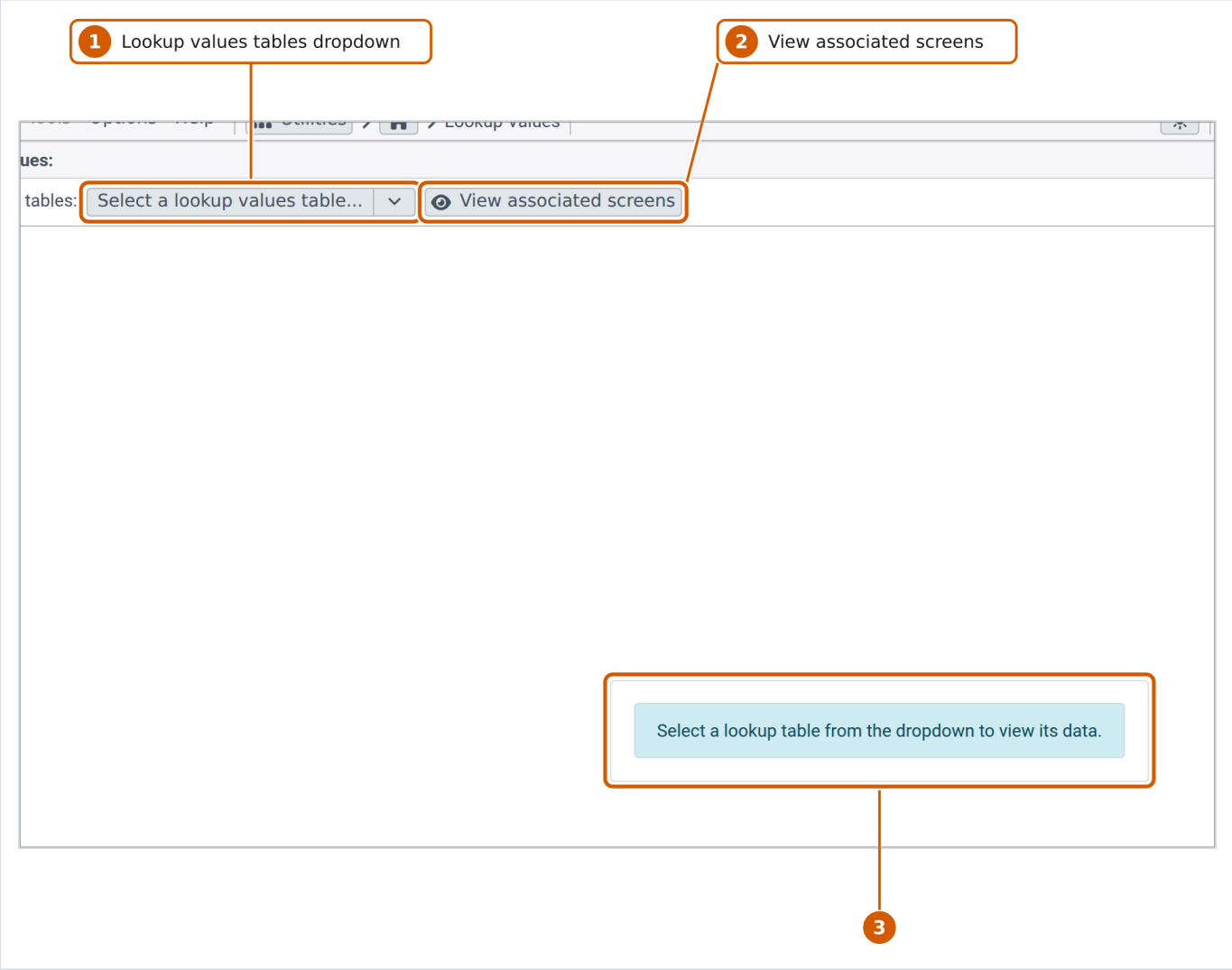
1. Open the screen from the portal you are working in:

PORTAL	MENU PATH IN THE DRAWER MENU	WHAT OPENS
Utilities	**Lookup Values Screens** > **Lookup Values**	The Lookup Values screen. The dropdown lists every lookup table.
Cost Accounting	**Utilities** > **Lookup Values**	The Lookup Values screen, listing only Cost Accounting tables.
Accounts Payable	**Accounts Payable Utilities** > **Lookup Values**	The Lookup Values screen, listing only Accounts Payable tables.
Equipment Maintenance	**EMS Utilities** > **Lookup Values**	The Lookup Values screen, listing only Equipment Maintenance tables.
Road Inventory	**RIS Utilities** > **Lookup Values**	The Lookup Values screen, listing only road inventory tables.

PORTAL	MENU PATH IN THE DRAWER MENU	WHAT OPENS
Service Requests	**SRS Utilities** > **Lookup Values**	The Lookup Values screen, listing only Service Requests tables (Contact Method, Priority, Response Method).
Vegetation Management	**Lookup Values** group; choose the list you need	The chosen list opens as its own screen, not the shared Lookup Values screen.

On the Lookup Values screen, the header shows **Lookup Values** and the message "Select a lookup table from the dropdown to view its data." shows.

> **Tip:** Use the Utilities portal when you need tables from more than one module.



The Lookup Values screen in the Utilities portal before you choose a table.

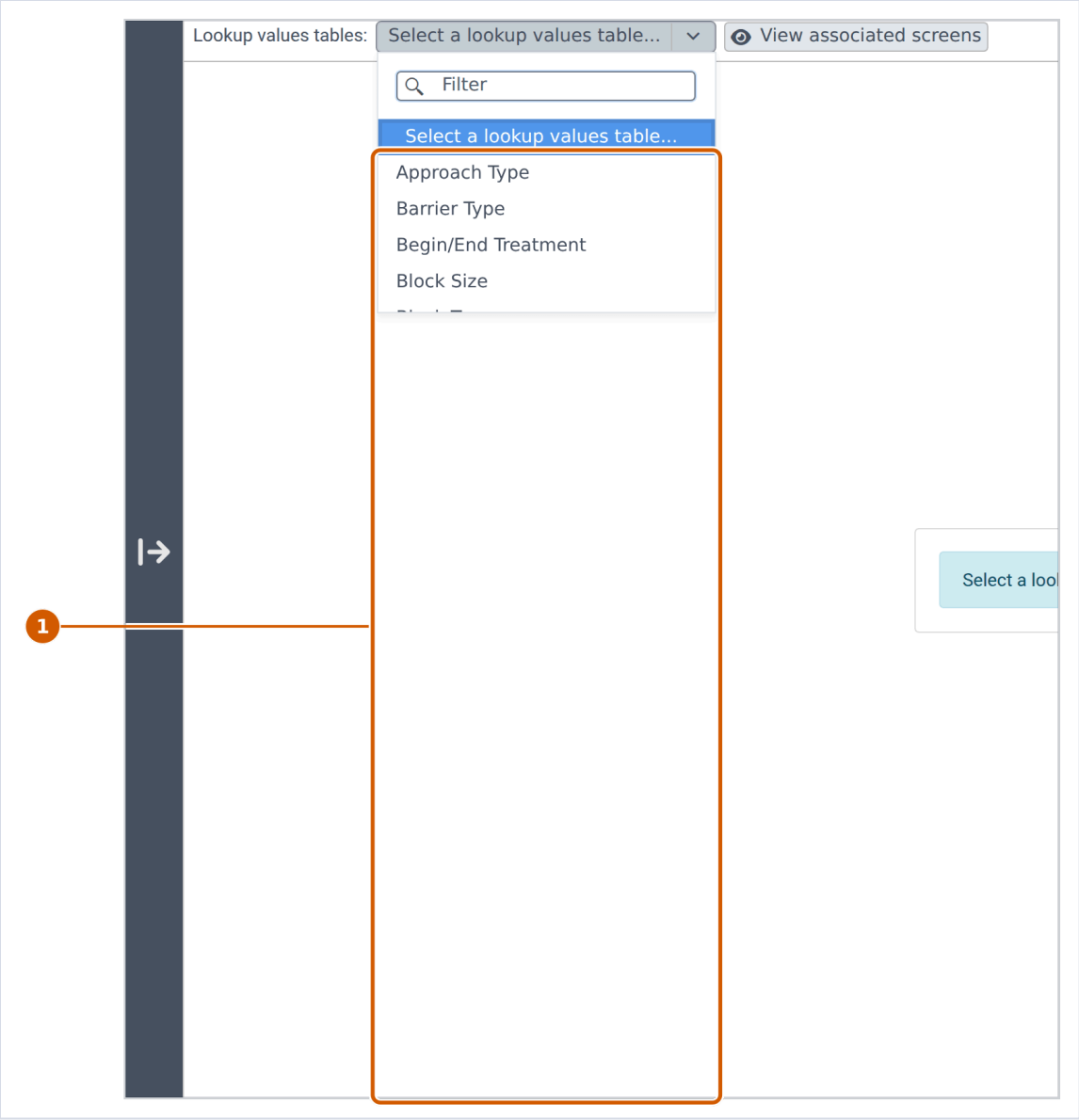
1. Lookup values tables dropdown
2. View associated screens
3. Shown until a table is chosen

Choose a lookup table and view its values

1. On the Lookup Values screen, click the **Lookup values tables** dropdown (placeholder "Select a lookup values table...").

   The list of lookup tables for the current portal opens in alphabetical order.

   > **Note:** Utilities lists every lookup table. Other portals list only the tables assigned to them.

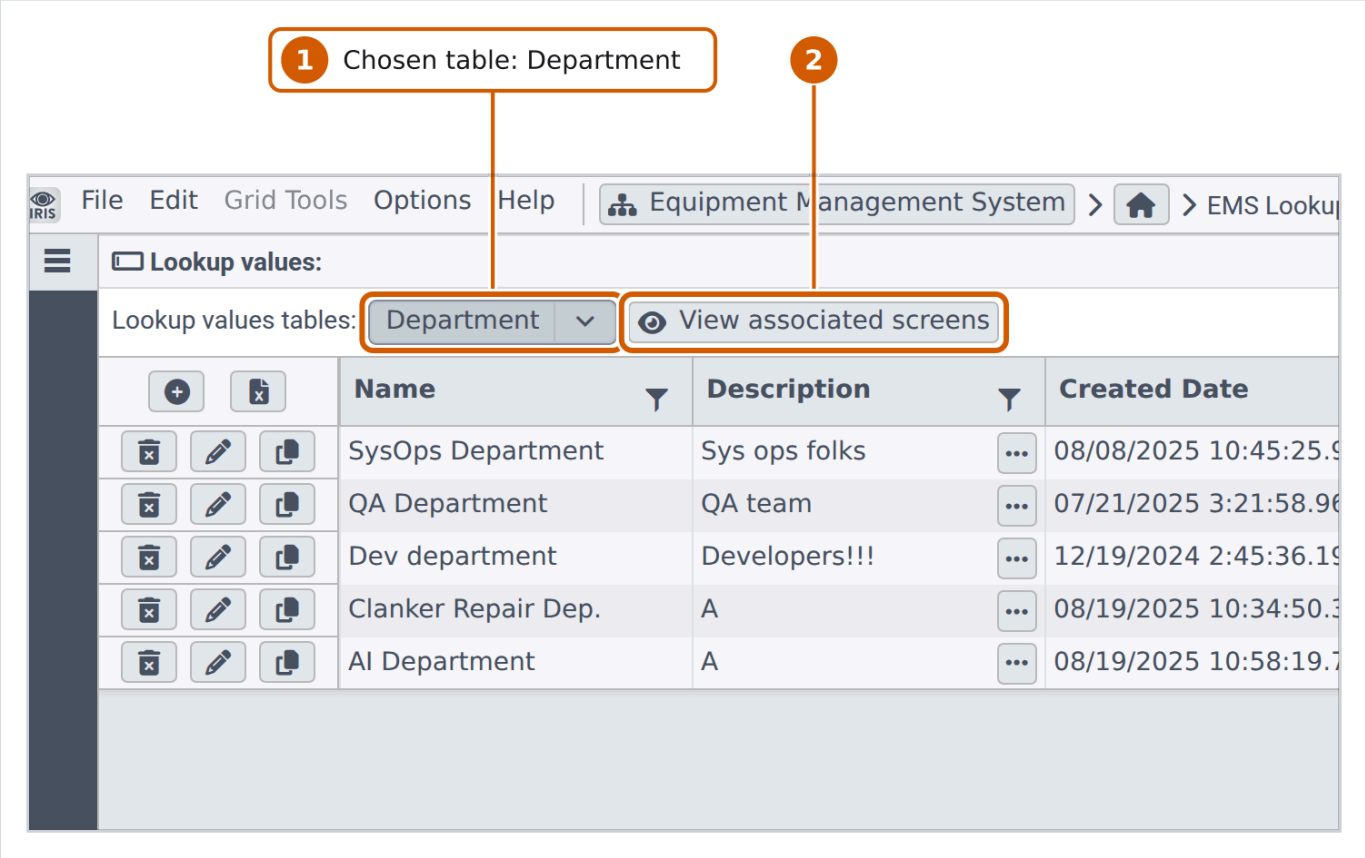


In Utilities, the dropdown lists every lookup table in alphabetical order.

1. Every lookup table
2. Optional: Type part of a table name.

   The list shows only tables whose names contain what you typed.
3. Click a table name, for example **Department**.

The message is replaced by a grid of that table's values. Choosing a table only displays data and changes nothing.



Department chosen in Equipment Maintenance. The grid lists its values.

1. Chosen table: Department
2. See where this table is used

4. Use the grid controls to sort, filter from the column menus, resize or reorder columns, or change the page size at the bottom. See Grid filters.

   The grid updates. If the table has no values, the grid shows "The result contained no records".

5. To start over, clear the dropdown back to its placeholder.

   The grid empties and the message "Select a lookup table from the dropdown to view its data." shows again.

See where a lookup table is used

1. Choose a table in the **Lookup values tables** dropdown.

   The table's grid is displayed.

2. Click **View associated screens** (tooltip "Click to view the screens associated to the current lookup table.").

A draggable **View Associated Screens** window opens, with a card headed "Lookup value:" followed by the table name. The card lists the names of the tables linked to this lookup table.

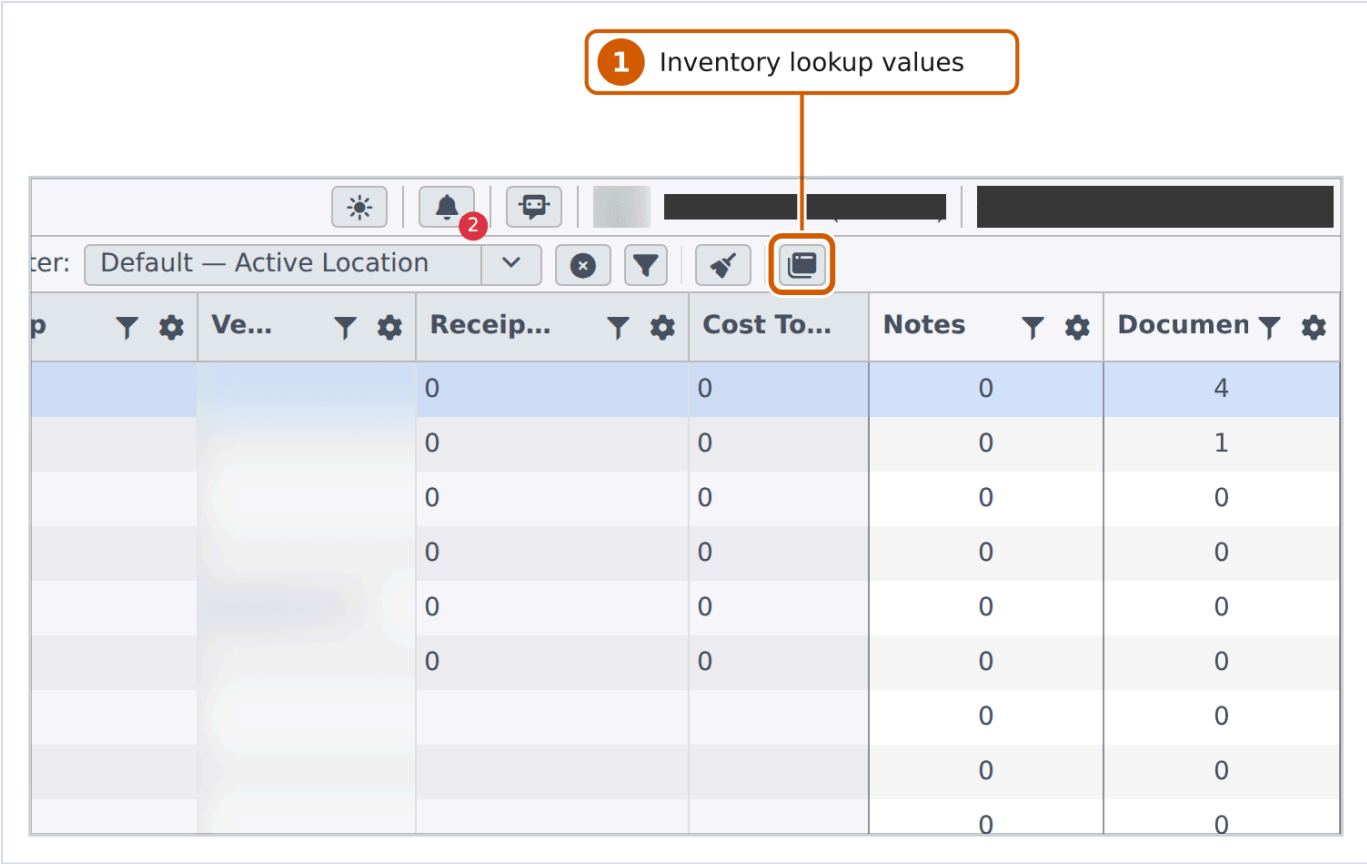
> **Note:** If no table is chosen, the message "Please select a valid lookup table." appears instead.

Open lookup values from a Cost Accounting screen

1. Open the window from the Cost Accounting screen you are working in:

SCREEN	TOOLBAR BUTTON	WHAT OPENS
Inventory	**Inventory lookup values** (tooltip "Open the inventory lookup values dialog."). You can also choose **Options** > **Inventory Lookup Values** from the main menu.	The **Inventory Lookup Values** window. Its **Lookup Values:** dropdown lists Inventory Category and Inventory Location. The first table is selected automatically and its grid shows.
RBF	**RBF lookup values** (tooltip "Open the road/bridge/facility lookup values dialog.")	The **Road/Bridge Facilities Lookup Values** window with Bridge/Facility Type selected and its grid shown.
Activity	**Actvity lookup values** (spelled as on screen; tooltip "Open the activity lookup values dialog.")	The **Activity Lookup Values** window with Workers Comp Codes selected and its grid shown.

> **Note:** The window offers only the tables that belong to the screen you opened it from.



On the Cost Accounting Inventory screen, Inventory lookup values opens the Inventory Lookup Values window.

1. Inventory lookup values
2. To switch tables in a window that offers more than one, choose another table in the **Lookup Values:** dropdown.

   The grid changes to the chosen table.

Add a lookup value

1. Choose the table in the **Lookup values tables** dropdown.

   The table's grid is displayed.
2. Click **Add new record** (the plus button in the grid header; keyboard shortcut Ctrl+Shift+A).

   A new editable row appears at the top of the grid.

   > **Note:** The button appears only for users with 2 - Read/Write or higher on the screen who also meet the table's add level.
3. Type the Name. Name is required, and its maximum length depends on the table.

   If you leave Name empty, the grid shows a required-field message such as "Your Name is required."
4. Optional: Type a Description.
5. Click the checkmark on the row.

The row is saved. New values are saved with Is System Data set to false. The screen has no separate Save button.

> **Note:** You cannot set Is System Data.

Duplicate a lookup value

1. On the row you want to copy, click **Duplicate record**.
   A new editable row is created from the selected row.

   > **Note:** The button appears only when your access level meets the table's add level.
2. Change the Name and any other fields.
3. Click the checkmark to save.
   The new value is saved.

Edit a lookup value

1. On the row, click **Edit record** (the pencil button; keyboard shortcut Ctrl+Shift+E).
   The row becomes editable in the grid. The Is System Data cell keeps its value and cannot be edited.

   > **Note:** This button requires 2 - Read/Write or higher.
2. Change the Name or Description.
3. Click the checkmark to save.
   The change is saved. Two messages can appear instead:
   - If the row is marked Is System Data, the save is refused with "Not authorized to affect system data."
   - If someone else changed the row after you loaded it, you see "Record has been modified by someone else since being queried from the database, refresh and try your update again". Refresh the grid and make your change again.

   > **Note:** System data rows cannot be changed at any access level.

Delete a lookup value

1. On the row, click **Delete record** (the trash button).
   IRIS10 asks you to confirm the delete.

   > **Note:** The button appears only for users with an access level above 2 - Read/Write, on tables that allow deleting.
2. Confirm the delete.
   The value is removed permanently, together with its comments and documents. The delete is recorded in audit history. If the row is marked Is System Data, the delete is refused with

"Record List contains System Data which cannot be deleted."

> **Note:** System data rows cannot be deleted at any access level.

Reference

Where to find lookup values in each portal

PORTAL	HOW TO OPEN	TABLES LISTED
Utilities	**Lookup Values Screens** > **Lookup Values**	Every lookup table
Cost Accounting	**Utilities** > **Lookup Values**	Cost Accounting tables (for example Bridge/Facility Type, Department, Inventory Category, Inventory Location, Program, Workers Comp Codes, Zone)
Cost Accounting – Inventory screen	Toolbar button **Inventory lookup values**, or **Options** > **Inventory Lookup Values**; opens the **Inventory Lookup Values** window	Inventory Category, Inventory Location
Cost Accounting – RBF screen	Toolbar button **RBF lookup values**; opens the **Road/Bridge Facilities Lookup Values** window	Bridge/Facility Type
Cost Accounting – Activity screen	Toolbar button **Actvity lookup values**; opens the **Activity Lookup Values** window	Workers Comp Codes
Accounts Payable	**Accounts Payable Utilities** > **Lookup Values**	Management Unit, Program, Zone
Equipment Maintenance	**EMS Utilities** > **Lookup Values**	Department, Equipment Condition, Equipment Maintenance Type, Equipment Status, Fuel Type, Part Category, Repair Type, Work Order Status
Road Inventory	**RIS Utilities** > **Lookup Values**	Road inventory tables (about 30)
Service Requests	**SRS Utilities** > **Lookup Values**	Contact Method, Priority, Response Method
Vegetation Management	**Lookup Values** menu group	Each list is a separate screen; this portal does not use the shared Lookup Values screen

Lookup Values screen elements

ELEMENT	WHAT IT DOES
Lookup values tables: (dropdown, placeholder "Select a lookup values table...")	Chooses the table to show. Type to filter the list.
View associated screens	Opens the **View Associated Screens** window, which lists the table names linked to the chosen lookup table.

ELEMENT	WHAT IT DOES
Message "Select a lookup table from the dropdown to view its data."	Shown when no table is chosen.
Grid	Shows the chosen table's values.

Lookup grid buttons

BUTTON	WHERE	WHO SEES IT
Add new record. (ctrl+shift+a)	Grid header (plus)	2 - Read/Write or higher, and the table's add level
Export grid as an Excel file.	Grid header	2 - Read/Write or higher on the screen (same check as Add)
Edit record (ctrl+shift+e)	Each row (pencil)	2 - Read/Write or higher
Duplicate record	Each row	Users whose level meets the table's add level
Delete record	Each row (trash)	Levels above 2 - Read/Write, on tables that allow deleting
Checkmark	Row being edited	Saves the row
Refresh and page size (100, 250, 500, 750, 1000)	Grid footer	All users

Messages

MESSAGE	WHEN IT APPEARS	WHAT TO DO
Select a lookup table from the dropdown to view its data.	No table is chosen.	Choose a table in the dropdown.
Please select a valid lookup table.	**View associated screens** was clicked with no table chosen.	Choose a table first.
The result contained no records	The chosen table has no values (or none match your filters).	Add a value or clear filters.
Your Name is required.	You save a row with no Name.	Enter a Name.
Not authorized to affect system data.	You save changes to a row marked Is System Data.	System data cannot be changed. Add a new value instead.
Record List contains System Data which cannot be deleted.	You delete a row marked Is System Data.	System data cannot be deleted.

MESSAGE	WHEN IT APPEARS	WHAT TO DO
Record has been modified by someone else since being queried from the database, refresh and try your update again	Another user changed the row after you loaded it.	Refresh the grid and make your change again.

Tips and notes

Tip: Use the Utilities portal when you need a lookup table from another module. Its dropdown lists every lookup table, while other portals list only their own.

Note: If an inventory location you need is missing, add it under Lookup Values (Inventory Location) first. You can then use it on an inventory record.

Important: Rows marked Is System Data cannot be edited or deleted. Add a new value instead.

Important: Deleting a lookup value removes it permanently, along with its comments and documents. Before you delete a value, check where the table is used with **View associated screens**.

Note: Choosing a table in the dropdown only displays its values. Nothing changes until you add, edit or delete and save a row.

Note: The Is System Data column shows true or false and cannot be edited. New values are saved as false.

Related topics

- Navigating portals and pages
- Data grid overview and basics
- Grid viewing and editing
- Grid filters
- Security Administration: access levels by user
- Units of measure, fiscal years and organizations

Notifications

Overview

IRIS10 sends you a notification when background work you started finishes (Excel exports, screen reports and postings) and when service requests change. Notifications appear in three places:

- The bell badge in the application header.
- The Notifications tray, which opens below the bell.
- The Notifications window, which is larger and movable.

Excel exports that send notifications start from data grids. See Data grid overview and basics.

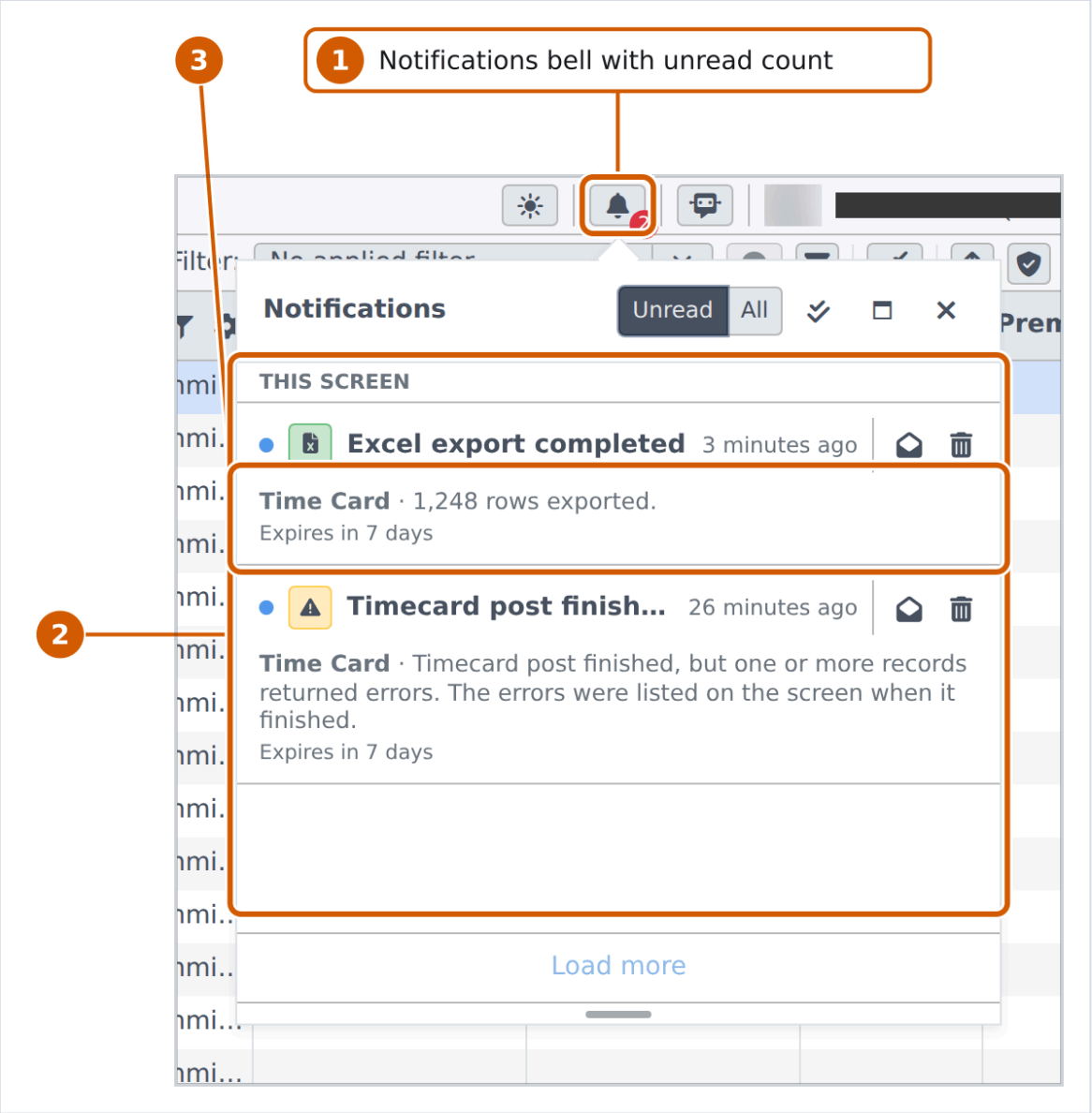
Before you begin

- Sign in to IRIS10.
- Know where the application header and the File menu are. See Navigating portals and pages.
- To choose how you are notified for each action, use My IRIS Settings. See My IRIS Settings.

Procedure

Check your notifications from the bell

1. Look at the **Notifications** bell button in the application header. A small red badge on the bell shows how many unread notifications you have. Counts above 99 show as `99+`.
2. Click the **Notifications** bell. The Notifications tray opens below the bell and shows your unread notifications. If you have none, it reads "No unread notifications".



Click the Notifications bell to open the tray of unread notifications.

1. Notifications bell with unread count
2. Notifications tray
3. A notification card

3. To see older notifications, scroll to the bottom of the tray and click **Load more**. Four more notifications are added to the list. Once the tray holds 40, **Load more** opens the Notifications window instead (tooltip "Open the notifications window to see more.").
4. Optional: drag the handle at the bottom of the tray. The tray grows, up to one and a half times its normal height.
5. Close the tray by pressing Escape. The tray closes.

> **Note:** You can also close the tray by clicking **Close** in the tray header or by clicking the bell again.

Open the Notifications window

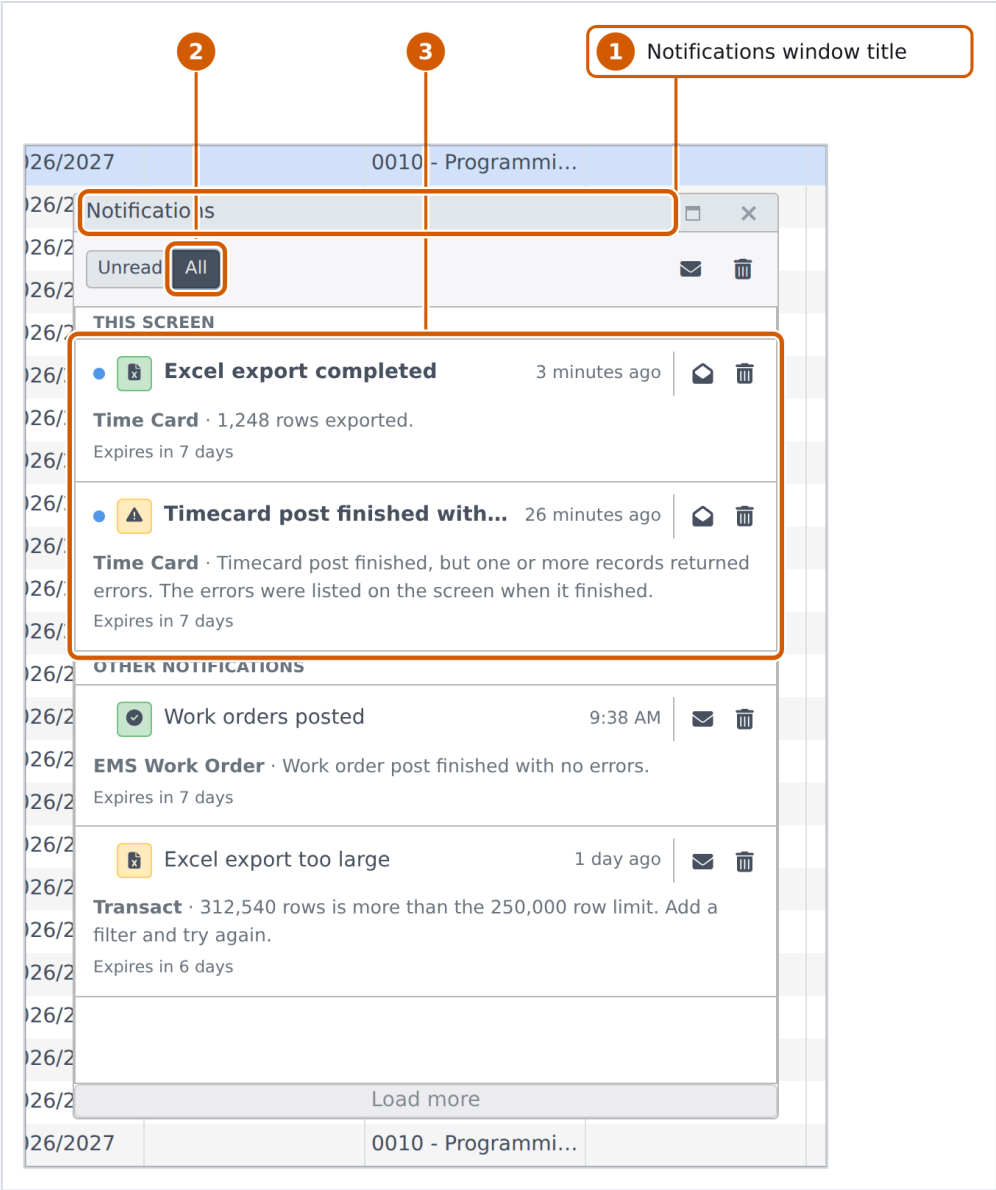
1. Click the **File** menu in the header. The File menu opens. The **Notifications** item (bell icon, just above **Logout**) shows its own unread-count badge when you have unread notifications.
2. Click **Notifications**. The Notifications window opens in the centre of the screen with **Unread** and **All** buttons, the list and a **Load more** button. You can keep working on the screen behind it.

   > **Note:** Alternatively, with the tray open, click **Open the notifications window** in the tray header. The Notifications window opens.

3. Optional: drag the window by its title bar. The window moves.
4. Optional: resize the window from an edge. The window resizes.
5. Optional: maximize the window. The window fills the screen.
6. Click **Load more** at the bottom of the window. The next 20 notifications are added. **Load more** is unavailable when there is nothing more to load.
7. Click the window's **Close** button when finished. The window closes.

Switch between unread and all notifications

1. In the tray or the Notifications window, click **All**. The list shows read and unread notifications. **Mark all as unread** and **Delete all read notifications** appear; **Mark all as read** is hidden. An empty list reads "No notifications".



The Notifications window in the All view, with Mark all as unread and Delete all read notifications available.

1. Notifications window title
2. All view
3. Notification list

2. Click **Unread** to return to the default view. Only unread notifications are listed and **Mark all as read** appears. An empty list reads "No unread notifications". The choice is shared, so the tray and the window always show the same view.

Mark one notification read or unread, or delete it

1. Click the body of an unread card. The notification is marked read. In the Unread view it leaves the list; in the All view it stays and loses its unread styling.

> **Note:** Alternatively, click the card's **Mark as read** or **Mark as unread** button. The card's read state flips. In the Unread view a card marked read disappears from the list.

2. To remove a notification, click the card's **Delete notification** button. The notification is deleted. Deleted notifications cannot be recovered.

Mark all notifications read

1. In the tray or window, make sure **Unread** is selected. The **Mark all as read** button is shown. It is unavailable when you have no unread notifications.
2. Click **Mark all as read**. All of your unread notifications in the county you are signed in to are marked read, and the Unread list empties.

Mark all notifications unread or delete all read notifications

1. In the tray or window, click **All**. **Mark all as unread** and **Delete all read notifications** are shown. Both are unavailable when you have no read notifications.
2. To restore everything to unread, click **Mark all as unread**. All of your notifications in the current county are marked unread.
3. To clear out read notifications, click **Delete all read notifications**. A confirmation asks "Delete all of your read notifications? This cannot be undone." with **Delete** and **Cancel** buttons.
4. Click **Delete** to proceed. Your read notifications in the current county are permanently removed; unread ones remain.

> **Note:** Click **Cancel** instead to keep them.

Show notifications that arrived while the list is open

1. While the tray or window is open, watch for the **New notifications** button at the top of the list. When new notifications arrive, a **New notifications** button (up-arrow icon) appears. The list does not reload by itself.
2. Click **New notifications**. The list scrolls to the top and reloads with the new notifications.

Choose how you are notified for each action

1. Open My IRIS Settings and go to the **Notifications** category. See My IRIS Settings. Settings are listed per action, grouped by feature group (Exports, Reports, CAS, APS, ARS, EMS, SWS, VMS, SRS).
2. For an action, turn **Show in IRIS** on or off. When on, a card appears in your tray and window for that action. When off, no card is saved.
3. Where available, turn **Send me an email** on or off. When on, IRIS also emails you the notification. **New Requests**, **Reassigned Requests** and **Reinstated Requests** have no email option.

4. For **Excel Export** and **Screen Reports**, select or clear **Attach the generated file**. The checkbox can be changed only while **Send me an email** is on. When selected, the file is attached to the email and the card message ends "A copy was sent to your email."

Reference

Actions that send a notification

Each user chooses delivery per action in My IRIS Settings.

FEATURE GROUP	SETTING	CARD TITLES / RESULTS	DELIVERY OPTIONS
Exports	Excel Export	Excel export completed; Excel export too large; Excel export failed	Show in IRIS, Send me an email, Attach the generated file
Reports	Screen Reports	Report completed; Report failed	Show in IRIS, Send me an email, Attach the generated file
CAS	Post Timecards (also covers held equipment reading posts)	Timecards posted; Timecard post finished with errors; Timecard post failed; Timecard post result unknown	Show in IRIS, Send me an email
CAS	Post Inventory Receiving; Post Inventory Transfers; Post Accrued Time; Post Inventory Physical Count	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
APS	Release Approved Payments	Payments released, or a finished with errors / failed / result unknown title	Show in IRIS, Send me an email
ARS	Issue Approved Invoices	Invoices issued, or a finished with errors / failed / result unknown title	Show in IRIS, Send me an email
EMS	Post Maintenance Entries; Post Work Orders; Post Reading Updates	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
SWS	Post Inspection Entries; Post Maintenance Entries; Post Road Rating Entries	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
VMS	Post Spray Reports to CAS	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
SRS	New Requests; Reassigned Requests; Reinstated Requests	New service request; Service request reassigned; Service request reinstated	Show in IRIS only

FEATURE GROUP	SETTING	CARD TITLES / RESULTS	DELIVERY OPTIONS
SRS	Completed Requests	Service request completed (one notification listing the request numbers when several are completed together)	Show in IRIS, Send me an email

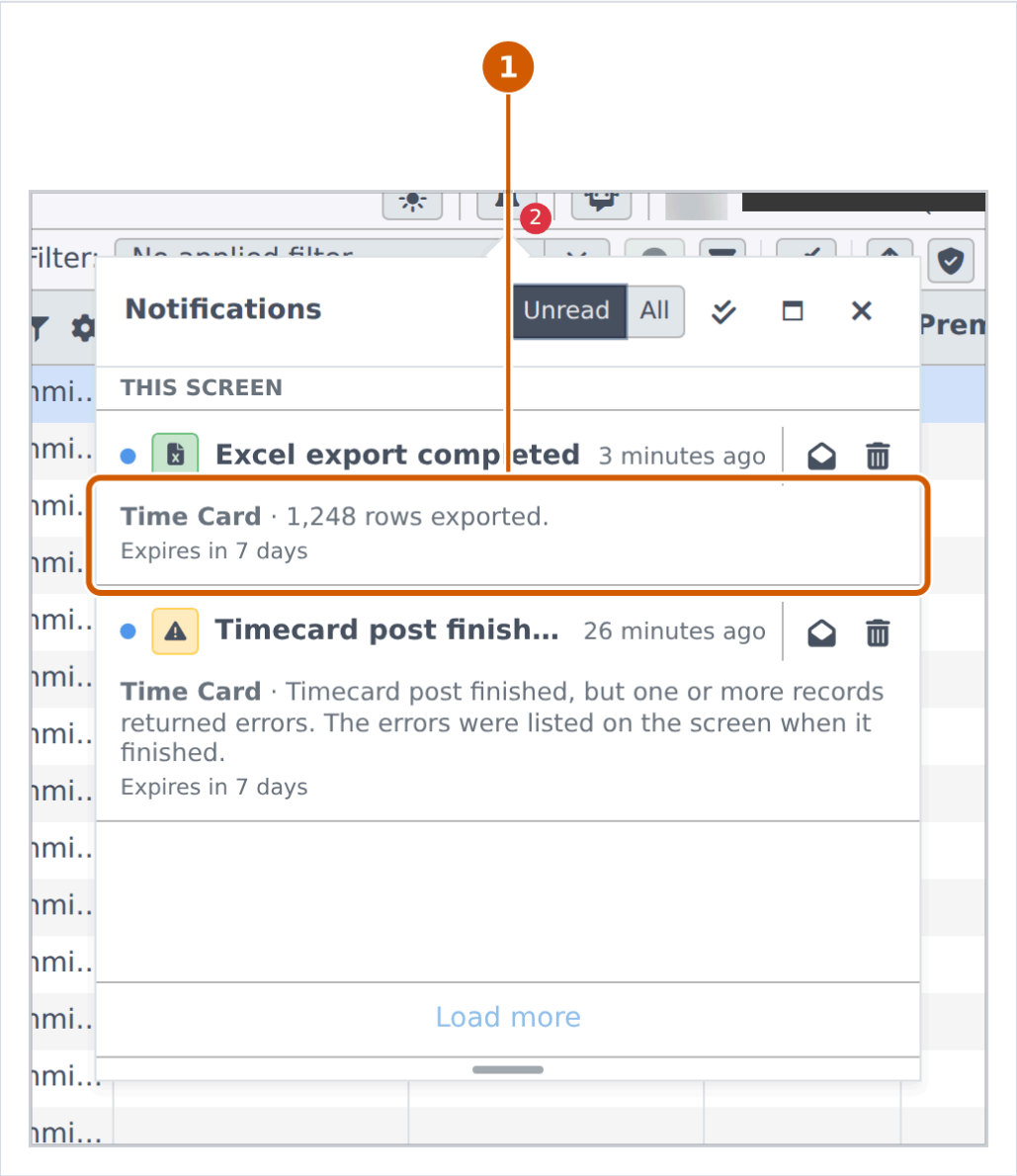
What posting results mean

RESULT	MEANING
Completed	The post finished successfully.
Finished with errors	The post finished, but some records had errors (shown as a warning).
Failed	The post did not complete (shown as an error).
Result unknown	IRIS lost contact before the post finished; the post may still have completed. Check the records before posting again.
No notification	A post rejected by validation, or one that finds no records, sends no notification.

Default delivery settings

OPTION	DEFAULT
Show in IRIS	On
Send me an email	Off
Attach the generated file	On (takes effect only when email is on)

Notification card



A notification card shows its title, age, message and expiry, with buttons to mark it read or unread and to delete it.

1. Card: title, age, message, expiry, Mark as read and Delete notification buttons

PART	WHAT IT SHOWS
Title	What happened, for example Excel export completed. A notification without a title shows "Notification".
Age	"Moments ago", then minutes ago, then the time of day for today, then days ago for up to 6 days, then the full date and time. Hover to see the full date and time.
Message	Details, prefixed with the screen name when known. May end "A copy was sent to your email." or "The file was too large to attach to your notification email."

PART	WHAT IT SHOWS
Expiry line	"Expires in moments", "Expires in N minutes", "Expires today at <time>", "Expires tomorrow at <time>" or "Expires in N days"; highlighted when less than 24 hours remain.
Unread style	Unread cards are styled differently from read cards.
Mark as read / Mark as unread	Flips the card's read state.
Delete notification	Permanently deletes the card.

Unread and All views

VIEW	BULK BUTTONS SHOWN	EMPTY LIST TEXT
Unread (default)	Mark all as read (unavailable when nothing is unread)	No unread notifications
All	Mark all as unread; Delete all read notifications (unavailable when nothing is read)	No notifications

Tray and window compared

	TRAY	NOTIFICATIONS WINDOW
Opened from	Notifications bell in the header	File > Notifications, or Open the notifications window in the tray
Loads	4 at a time; after 40, Load more opens the window	20 at a time
Size	Fixed width; can be dragged taller	Movable, resizable, can be maximized
Controls	Unread/All, bulk buttons, Open the notifications window, Close, Load more	Unread/All, bulk buttons, Load more, Maximize, Close
Closes with	Escape, Close or the bell	Close

Tips and notes

Important: Deleting a notification, or using **Delete all read notifications**, is permanent. Deleted notifications cannot be recovered.

Note: Notifications expire. If no expiry is set, a notification expires 7 days after it was created and is then removed automatically. Removal runs periodically, so an expired card may remain visible for a short time.

Note: The unread count refreshes about once a minute while the IRIS tab is visible, and again when you return to the tab.

Tip: When the screen you are on has notifications of its own, the list shows them first under "This screen", with the rest under "Other notifications".

Note: An Excel export of 250,000 rows or more is not produced; you get an "Excel export too large" notification asking you to add a filter. See Grid filters.

Note: If a generated file is larger than the allowed attachment size, it is not attached and the message says "The file was too large to attach to your notification email."

Important: Email is sent only when you turned on **Send me an email** for that action and your user record has a valid email address. No email is sent while an administrator is signed in as you.

Note: For service requests, the person who made the change is not notified. New, reassigned and reinstated requests are shown only in IRIS.

Note: Notifications belong to you alone, and bulk actions affect only your notifications in the county you are signed in to.

Tip: Clicking a card marks it read. To keep it unread, use **Mark as unread** on the card afterwards.

Related topics

- My IRIS Settings
- Navigating portals and pages
- Grid filters
- Data grid overview and basics

My IRIS Settings

Overview

My IRIS Settings is a window in the Utilities portal where you set your personal preferences for the county you are working in. Settings are saved for the county you are currently working in.

Some settings depend on your access. The Time Card settings (Default Date, Associate Road and Associate Project) appear only if you have Read/Write or higher access to the Time Card screen. Notification settings always appear.

Before you begin

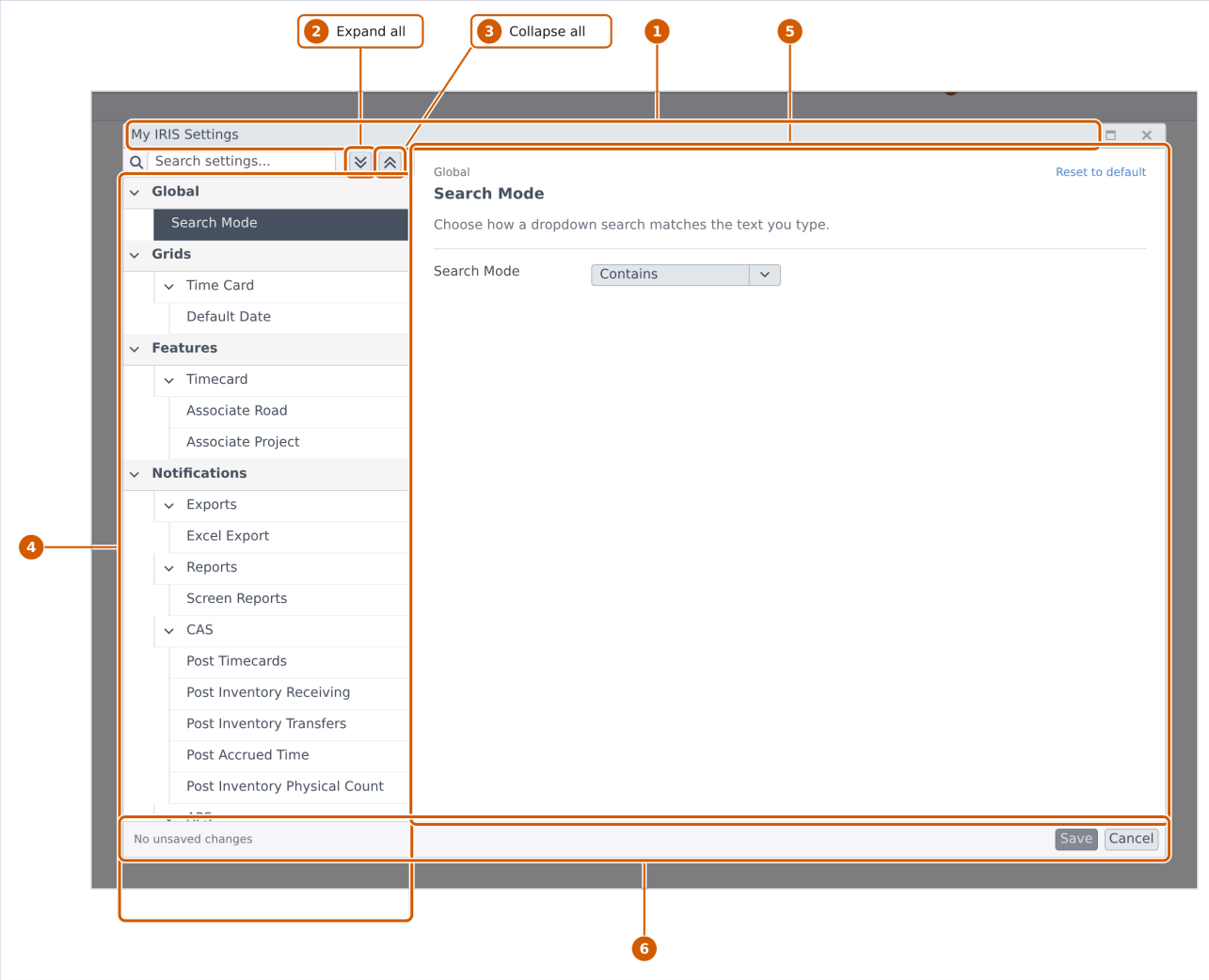
- Sign in to IRIS10. See Logging in. The county you choose when you sign in determines where your settings are saved.
- Make sure you have access to the My IRIS Settings screen in the Utilities portal. See Security Administration: access levels by user.
- For the Time Card settings, make sure you have Read/Write or higher access to the Time Card screen.

Procedure

Open My IRIS Settings and find a setting

1. In the Utilities portal, open My IRIS Settings. A window titled **My IRIS Settings** opens with the settings tree on the left, a detail panel, and a footer showing **No unsaved changes** with **Save** and **Cancel**.

   > **Note:** If you do not have access to My IRIS Settings, the screen does not open and no message is shown. Ask your IRIS administrator for access.



The My IRIS Settings window, with the settings tree, the detail panel for Search Mode, and the footer.

1. Window title
2. Expand all
3. Collapse all
4. Settings tree
5. Detail panel with Reset to default
6. Unsaved-changes status, Save and Cancel

2. Look over the settings tree. All categories start expanded. Click **Collapse all** to fold them, or **Expand all** to open them again. The tree shows the Global, Grids, Features and Notifications categories and their settings.

> **Note:** The Grids and Features categories appear only if you have Read/Write or higher access to the Time Card screen. Notification settings always appear.

3. To find a setting, type in the **Search settings** box above the tree. The box shows how many settings match what you typed.
4. Select a setting in the tree. The detail panel shows the setting's category and name, a **Reset to default** button, a short description, and the control for its value.

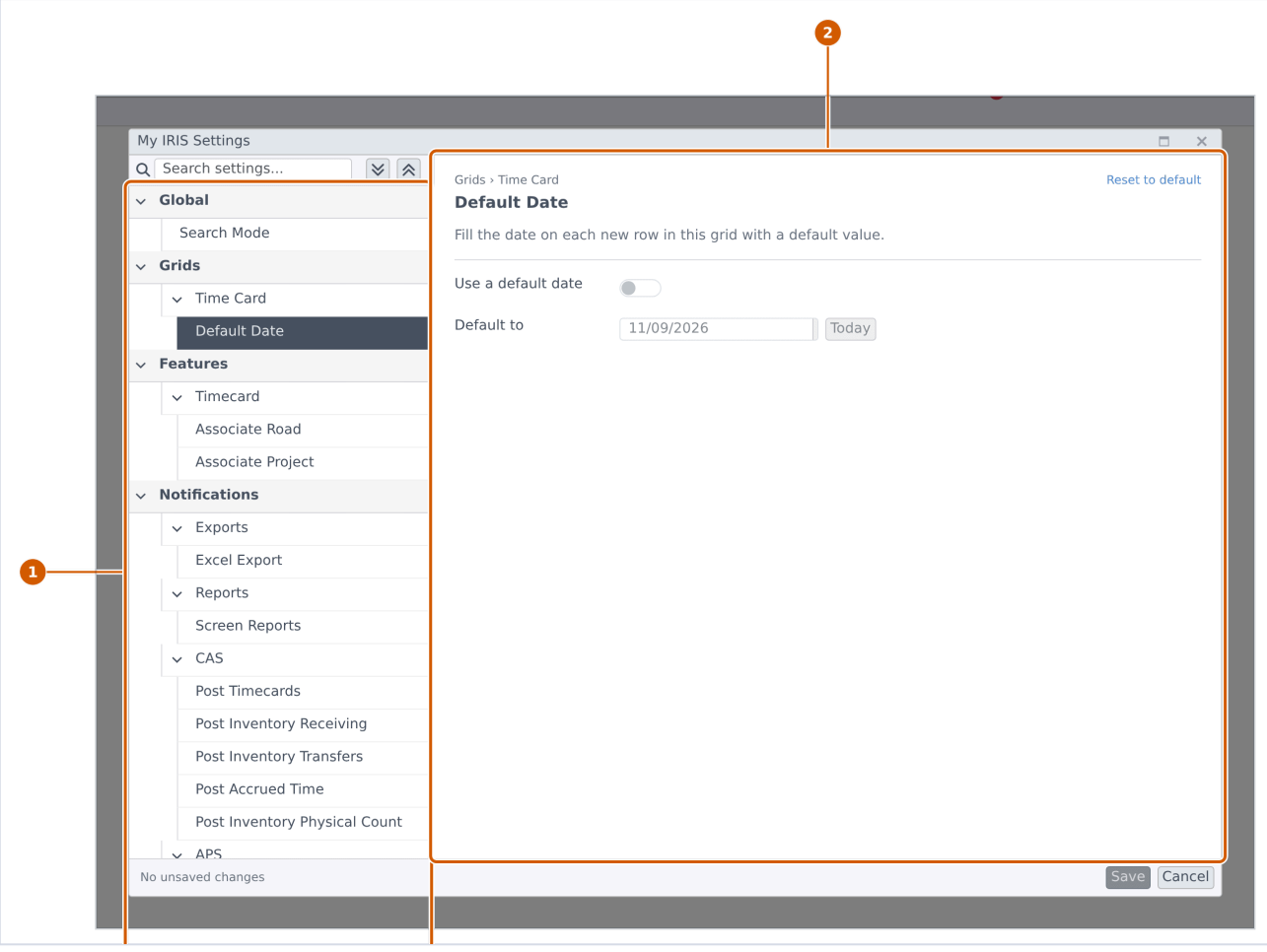
Change how dropdown searches match (Search Mode)

1. In the tree, under **Global**, select **Search Mode**. The detail panel reads "Choose how a dropdown search matches the text you type." and shows the **Search Mode** dropdown (`Contains` by default).
2. In the **Search Mode** dropdown, choose `Starts With` or `Contains`. The footer shows **1 unsaved change** and **Save** becomes available.
3. Click **Save**. The footer shows **Settings saved**.

Set a default Task Date for new timecards

1. In the tree, under **Grids** > **Time Card**, select **Default Date**. The detail panel shows the **Default Date** setting, which is off by default.

> **Note:** This setting is shown only if you have Read/Write or higher access to the Time Card screen.



Default Date fills the Task Date of new timecards with Today or a date you choose.

1. Grids > Time Card > Default Date
2. Default Date setting

2. Turn **Default Date** on and choose Today or a specific date. The footer counts the unsaved change and **Save** becomes available.
3. Click **Save**. The footer shows **Settings saved**. New timecards fill the Task Date with the date you chose.

Fill timecard details from a road or project

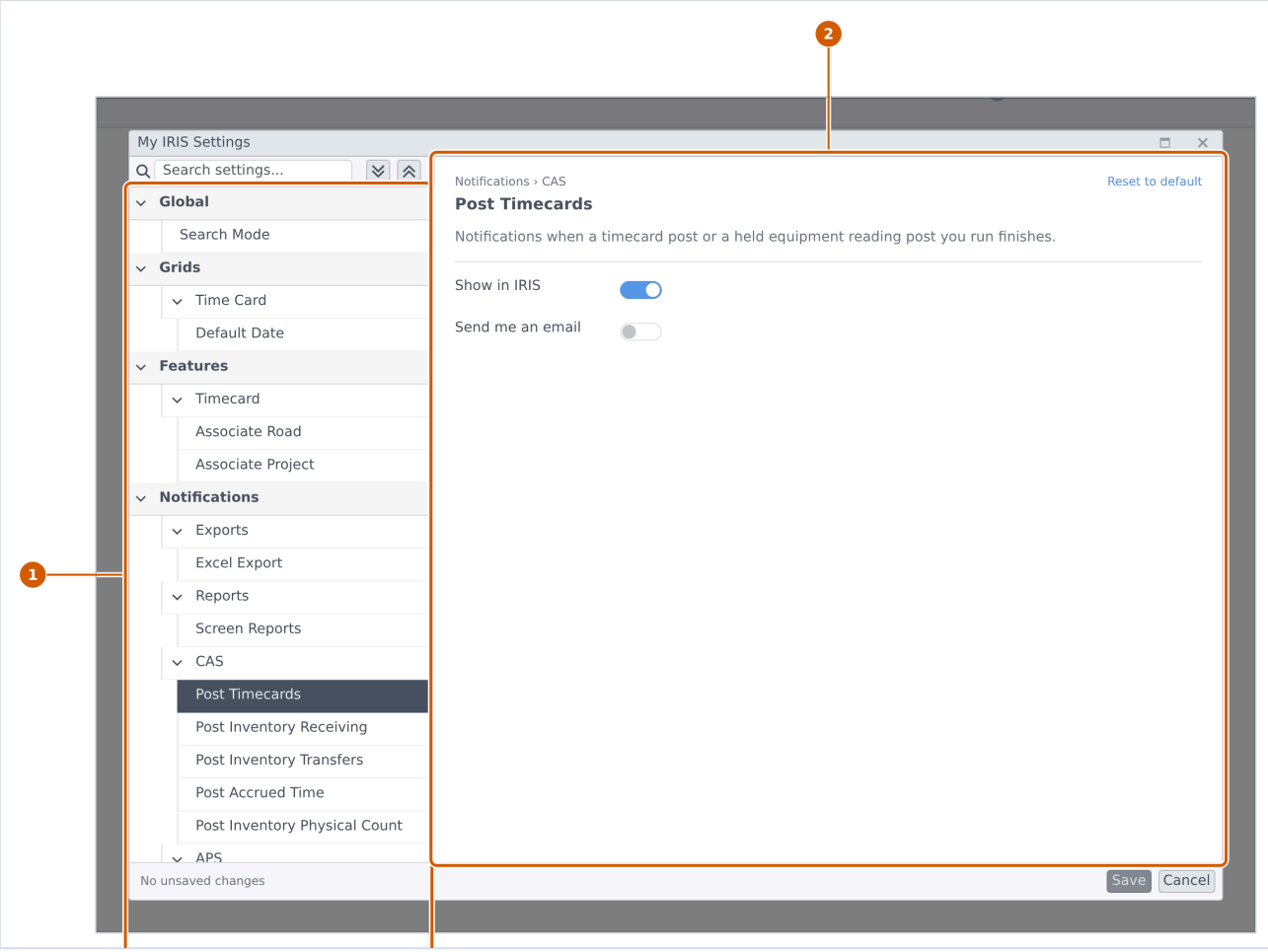
1. In the tree, under **Features** > **Timecard**, select **Associate Road** or **Associate Project**. The detail panel shows the setting. Both are off by default.

   > **Note:** These settings are shown only if you have Read/Write or higher access to the Time Card screen.

2. Turn the setting on. **Associate Road** fills a timecard's management unit, program and zone from the road you pick. **Associate Project** fills management unit, program, zone, road, points and locations from the project.
3. Click **Save**. The footer shows **Settings saved**.

Choose how you receive a posting notification (example: CAS > Post Timecards)

1. In the tree, under **Notifications** > **CAS**, select **Post Timecards**. The detail panel shows **Show in IRIS** (on by default) and **Send me an email** (off by default).



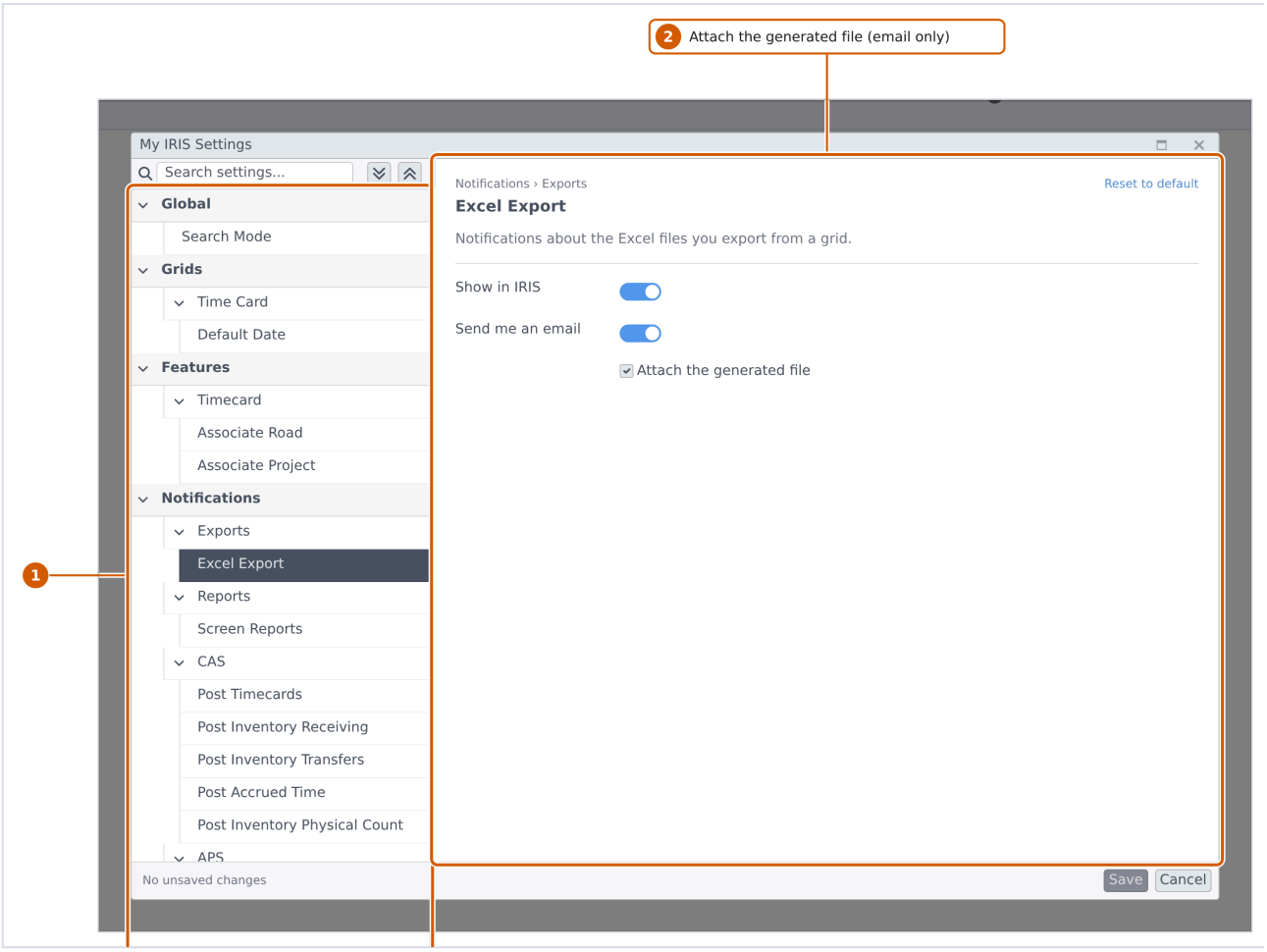
Notification setting for CAS > Post Timecards: choose whether to see it in IRIS and whether to receive an email.

1. Notifications > CAS > Post Timecards
2. Show in IRIS and Send me an email

2. Turn **Show in IRIS** on or off to choose whether the notification appears inside IRIS. The footer counts the unsaved change.
3. Turn **Send me an email** on or off to choose whether you also get the notification by email. The footer counts the unsaved change.
4. Click **Save**. The footer shows **Settings saved**.

Attach the generated file to Excel Export or Screen Reports emails

1. In the tree, under **Notifications**, select **Exports** > **Excel Export** or **Reports** > **Screen Reports**. The detail panel shows **Show in IRIS**, **Send me an email** and the **Attach the generated file** checkbox.



Excel Export notification: Attach the generated file can be used only while Send me an email is on.

1. Notifications > Exports > Excel Export
2. Attach the generated file (email only)

2. Turn **Send me an email** on. The **Attach the generated file** checkbox becomes available.
3. Select or clear **Attach the generated file** (selected by default). When selected, the exported file or report is attached to the email.
4. Click **Save**. The footer shows **Settings saved**.

Close the window without saving

1. Click **Cancel**. With no unsaved changes, the window closes. With unsaved changes, IRIS asks "You have unsaved changes. Close without saving them?"
2. Click **Close** to discard your changes. The window closes without saving.

   Alternatively, click **Keep Editing**. You return to your changes.
3. To reopen the window, click **Open My IRIS Settings** on the page. The My IRIS Settings window opens again.

Reference

Settings in My IRIS Settings

TREE LOCATION	SETTING	WHAT IT DOES	DEFAULT
Global	Search Mode	Chooses Starts With or Contains for dropdown searches that normally match anywhere in the text.	Contains
Grids > Time Card	Default Date	Fills the Task Date of new timecards with Today or a date you choose.	Off
Features > Timecard	Associate Road	Fills a timecard's management unit, program and zone from the road you pick.	Off
Features > Timecard	Associate Project	Fills management unit, program, zone, road, points and locations from the project.	Off
Notifications > Exports	Excel Export	Show in IRIS, Send me an email, and Attach the generated file.	Show in IRIS on; Send me an email off; Attach the generated file on
Notifications > Reports	Screen Reports	Show in IRIS, Send me an email, and Attach the generated file.	Show in IRIS on; Send me an email off; Attach the generated file on
Notifications > CAS	Post Timecards, Post Inventory Receiving, Post Inventory Transfers, Post Accrued Time, Post Inventory Physical Count	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > APS	Release Approved Payments	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > ARS	Issue Approved Invoices	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > EMS	Post Maintenance Entries, Post Work Orders, Post Reading Updates	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > SWS	Post Inspection Entries, Post Maintenance Entries, Post Road Rating Entries	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > VMS	Post Spray Reports to CAS	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > SRS	New Requests, Reassigned Requests, Reinstated Requests	Show in IRIS only; no email option.	Show in IRIS on

TREE LOCATION	SETTING	WHAT IT DOES	DEFAULT
Notifications > SRS	Completed Requests	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off

Footer status messages

MESSAGE	MEANING
No unsaved changes	Nothing has changed since the window opened or was last saved; Save is unavailable.
1 unsaved change / N unsaved changes	How many settings you have changed but not saved.
Settings saved	Your changes were saved.

Tips and notes

Important: Settings are saved for the county you are currently working in. If you work in more than one county, set your preferences in each one.

Note: A saved change also applies to your other open IRIS tabs in the same county. Tabs open in a different county keep that county's settings.

Note: Only the Time Card settings (Default Date, Associate Road, Associate Project) depend on your access. Without Read/Write or higher access to the Time Card screen, the Grids and Features categories do not appear. Notification settings always appear.

Tip: You can also switch Associate Road and Associate Project from the Options menu on the Time Card screen.

Note: Attach the generated file is offered only for Excel Export and Screen Reports, and only while **Send me an email** is on. It attaches the file to the email, not to the notification in IRIS. Posting notifications such as Post Timecards have no attach option.

Note: New Requests, Reassigned Requests and Reinstated Requests (SRS) appear only in IRIS; they have no email option.

Tip: Post Maintenance Entries appears twice in the tree, once under EMS and once under SWS. Check the category you are under before changing it.

Note: The light or dark theme is also saved for each county, but you set it with the theme button in the page header, not in this window. See Navigating portals and pages.

Related topics

- Notifications
- Grid viewing and editing
- Navigating portals and pages
- Security Administration: access levels by user
- Logging in

Security Administration: access levels by user

Overview

Security Administration lets you view and change the security levels of IRIS users for your county. Only users with General Access Level 5 - County Admin or higher can open the editor. Users below level 5 see the message 'You do not have the required security level to access Security Administration.' and a **Home** button that returns to the Utilities portal.

The editor has three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**. This page covers the **Set Security by User** tab. For the other tabs, copying user security and resetting security, see Security Administration: screens, reports, copying and resetting.

IRIS decides the level that applies to a user in this order, highest priority first:

1. A page override, when the user has one on that page.
2. A portal override, when there is no page override and the user has an override on the portal.
3. The General Access Level, when there is no page or portal override.

Before you begin

- Sign in to IRIS10 for your county. See Logging in.
- Make sure your General Access Level is 5 - County Admin or higher.
- Know how to move between portals and pages. See Navigating portals and pages.

Procedure

Open Security Administration

1. In the Utilities portal, open **Security Administration**.

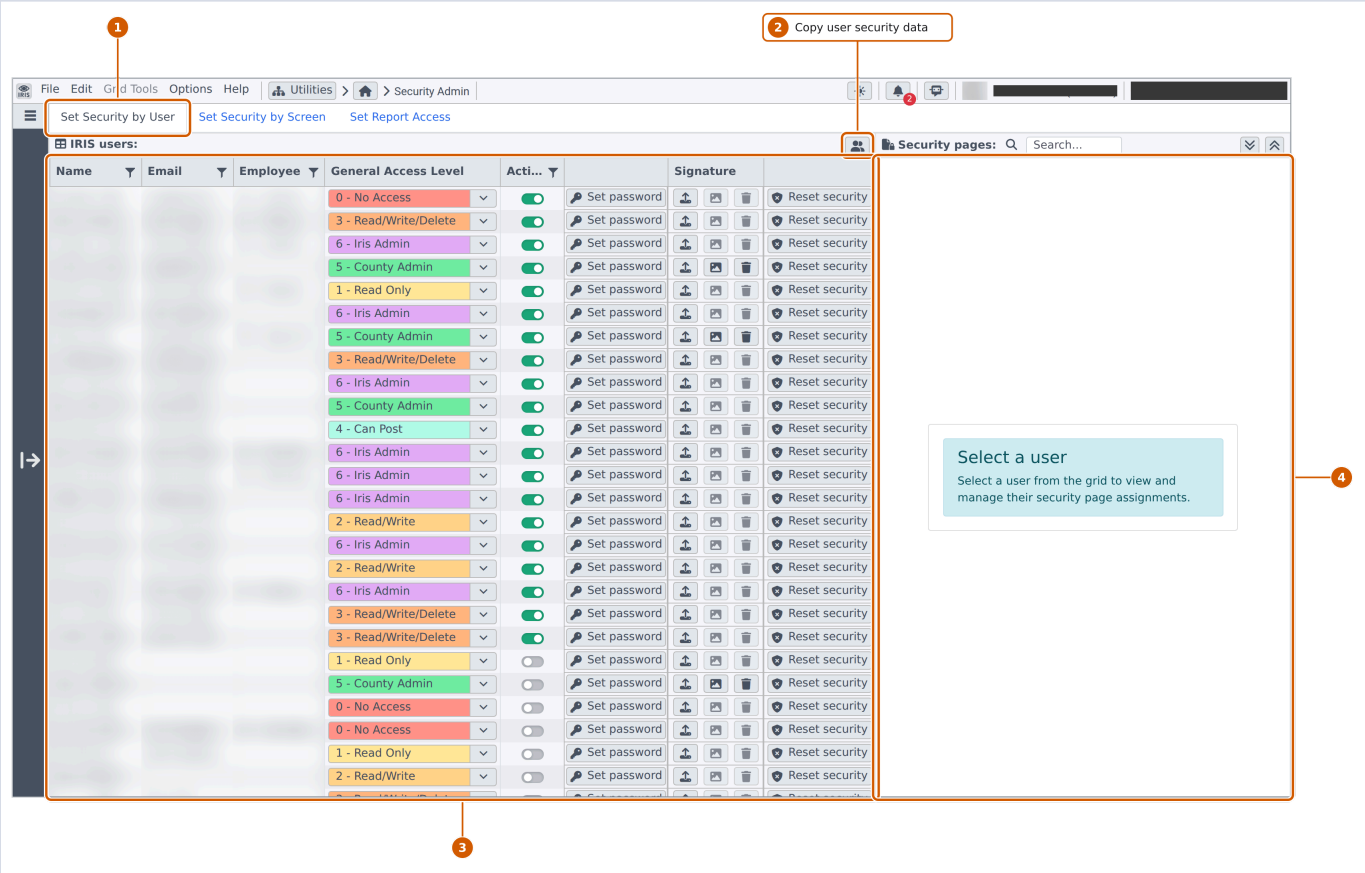
   The browser path is `/utilities/securityadmin`.

   > **Note:** Only users with General Access Level 5 - County Admin or higher see the editor.

2. Check what opens.

   The editor opens with three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**. The **Set Security by User** tab shows the IRIS users grid and a **Select a user** card.

> **Note:** Users below level 5 see 'You do not have the required security level to access Security Administration.' and a **Home** button that returns to the Utilities portal.



Security Administration opens on the Set Security by User tab, with the IRIS users grid on the left and the 'Select a user' card on the right.

1. Set Security by User tab
2. Copy user security data — covered on the companion page
3. IRIS users grid
4. Select a user

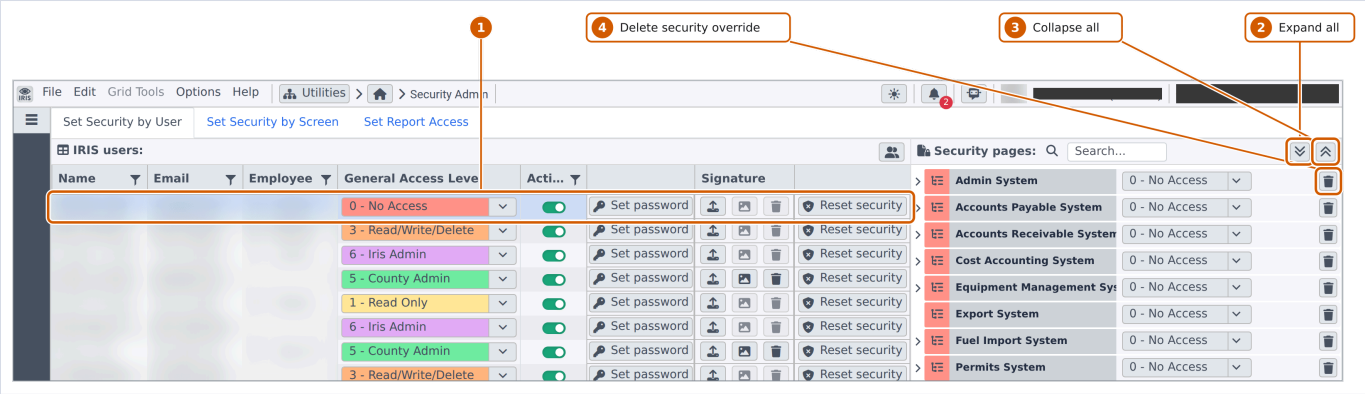
Select a user

1. On the **Set Security by User** tab, find the user in the IRIS users grid.

   To narrow the list, use the column filters. See Grid filters.
2. Click the user's row.

   The **Security pages** panel on the right shows that user's portals and pages, each with a level dropdown. The panel also has a search box and the **Expand all** and **Collapse all** buttons.
3. To see every page, click **Expand all**.

   All portals open to show their pages.



After you click a user's row, Security pages lists that user's portals and pages, each with a level dropdown and a Delete security override button.

1. Selected user
2. Expand all
3. Collapse all
4. Delete security override — available only when the item has its own override

Change a user's General Access Level

1. In the IRIS users grid, find the user's **General Access Level** dropdown and choose the new level.

   IRIS shows 'Warning! This will change the general access level to <level> for the user: <name>.' with **Accept** and **Cancel** buttons.

   > **Important:** Do not choose 6 - Iris Admin. That level is for the IRIS development and support team only.

2. Click **Accept**.

   IRIS saves the new level.

   > **Note:** To keep the current level, click **Cancel** instead. IRIS puts the previous level back and saves nothing.

3. Review the user's Security pages.

   The Security pages tree refreshes. Portals and pages without their own override now show the new General Access Level.

Set a portal or page level for a user

1. Click the user's row in the IRIS users grid.

   The user's Security pages appear.

2. In **Security pages**, find the portal or page.

   If needed, click **Expand all** or use the search box.

3. Choose a level in the dropdown next to the portal or page.

IRIS asks 'Change security level to <level> for <item>?' with **Accept** and **Cancel** buttons.

4. Click **Accept**.

   IRIS saves the level as an override for that portal or page, and the item's **Delete security override** button becomes available.

   > **Note:** To leave the level as it was, click **Cancel** instead.

Remove a portal or page override

1. Click the user's row and find the portal or page in **Security pages**.
2. Click the **Delete security override** button next to the item.

   For a portal, IRIS asks 'Are you sure you want to remove the security override for <item>? The effective level will revert to the general access level.' For a page, the message ends 'will revert to the portal level.' **Yes** and **No** buttons are shown.

   > **Note:** The button is available only when the item has its own override. Items that take their level from the portal or the General Access Level have it disabled.

3. Click **Yes**.

   IRIS removes the override. A portal goes back to the user's General Access Level, and a page goes back to the portal level.

   > **Note:** To keep the override, click **No** instead.

Make a user active or inactive

1. In the IRIS users grid, switch the user's **Active** switch on or off.

   The change saves right away, with no prompt.

Reference

Security levels

LEVEL (AS SHOWN)	WHAT IT ALLOWS
0 - No Access	No access to the portal or page. Access to a page needs level 1 or higher.
1 - Read Only	Open and view the portal or page.
2 - Read/Write	Adds editing records in grids. Whether **Add** appears depends on each screen's own add level.
3 - Read/Write/Delete	Adds deleting records in grids.
4 - Can Post	Adds posting menu items such as **Post**, **Approve** and **Void**.
5 - County Admin	County administrator. Can open Security Administration.

LEVEL (AS SHOWN)	WHAT IT ALLOWS
6 - Iris Admin	System Administrator level, held only by the IRIS development and support team. County administrators should not choose it.

Where a user's level comes from (highest priority first)

SOURCE	APPLIES TO	WHEN IT IS USED
Page override	One page	When the user has an override set on that page
Portal override	A portal and its pages without their own override	When there is no page override and the user has an override on the portal
General Access Level	Everything without an override	When there is no page or portal override

The General Access Level is a user's base security level for the county (0 to 6).

IRIS users grid (Set Security by User)

COLUMN OR CONTROL	WHAT IT SHOWS OR DOES
Name	User's name. Active users are listed first, then inactive users, each sorted by name.
Email	User's email address
Employee	Linked employee
General Access Level	Dropdown with the user's General Access Level. Changing it shows a warning with **Accept** and **Cancel**.
Active	On/off switch that saves right away
Set password	Opens the Set password window
Signature	Upload, view and delete buttons for the user's signature
Reset security	Removes the user's overrides after a warning. See Security Administration: screens, reports, copying and resetting.
Copy user security data (button above the grid)	Opens the Copy User Security window. See Security Administration: screens, reports, copying and resetting.

How the level affects buttons and menus

Toolbar buttons and menu items above the user's level are hidden. For what **Add**, **Edit** and **Delete** do in grids, see Grid viewing and editing. For the grid toolbar, see Data grid overview and basics.

ITEM	SHOWN WHEN
Toolbar buttons	The user's level for the screen is at least the level the button needs. Buttons above the user's level are not shown.
Add	Level 2 or higher, and the screen's own add level

ITEM	SHOWN WHEN
Edit records in grids	Level 2 - Read/Write or higher
Delete	Level 3 - Read/Write/Delete or higher
Post, Approve and Void menu items	Level 4 - Can Post or higher. Menu items above the user's level are hidden, not disabled.

Tips and notes

Important: 6 - Iris Admin is the System Administrator level, held only by the IRIS development and support team. Do not choose it for county users.

Note: Report pages never give more than 1 - Read Only, however high the user's page, portal or General Access Level is.

Tip: If **Delete security override** is greyed out, the item has no override of its own. It takes its level from the portal or from the General Access Level. To change the level, change the portal or the General Access Level, or set a new override on the item.

Note: Clicking **Cancel** on the General Access Level warning puts the previous level back. Nothing is saved.

Note: Security changes apply only to the county you are signed in to.

Tip: Release all approved payments needs only level 1. Do not treat it as a posting item.

Related topics

- Security Administration: screens, reports, copying and resetting
- Navigating portals and pages
- Logging in
- Data grid overview and basics
- Grid filters
- Grid viewing and editing

Security Administration: screens, reports, copying and resetting

Overview

Security Administration lets you work with the security of the users in your county. On it you can:

- Select a user and see their security.
- See and change which users have their own level on a portal or screen.
- Turn report access on or off for a user.
- Remove a security override.
- Copy one user's security to another user.
- Reset a user's security overrides.
- Make a user active or inactive.
- Set a user's password.
- Manage a user's signature.

The screen has three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**.

Before you begin

- Sign in with a General Access Level of **5 - County Admin** or higher. With a lower level, IRIS shows "You do not have the required security level to access Security Administration." and a **Home** button that takes you back to the Utilities portal.
- Know how to move between portals. See Navigating portals and pages.
- Know how security levels and overrides work for a single user. See Security Administration: access levels by user.

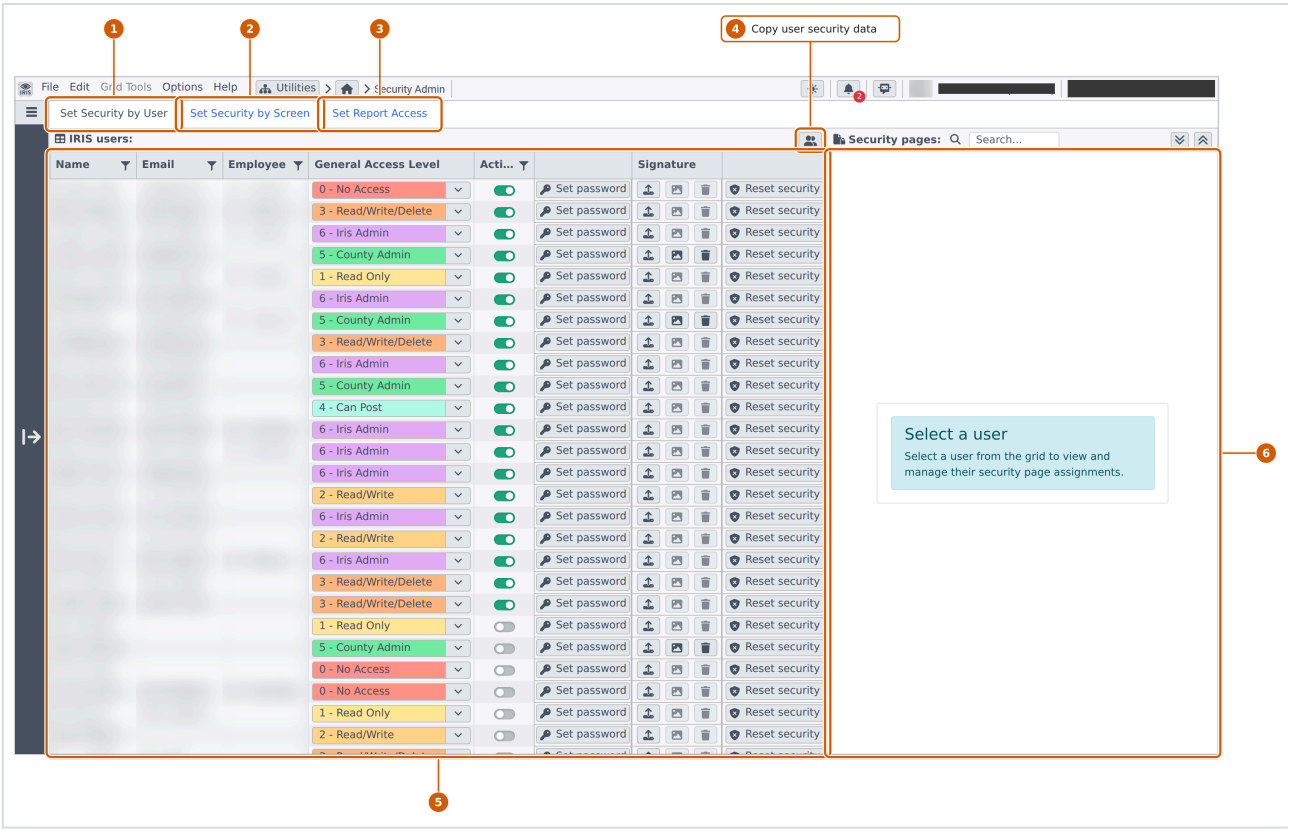
Procedure

Open Security Administration and select a user

1. Open the Utilities portal and choose **Security Administration**.

   The Security Administration screen opens with three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**.
2. On the **Set Security by User** tab, look at the IRIS users grid.

   The grid lists users with the columns **Name**, **Email**, **Employee**, **General Access Level**, **Active** and **Signature**. Active users are listed first, then inactive users, each sorted by name. The right-hand side shows "Select a user".

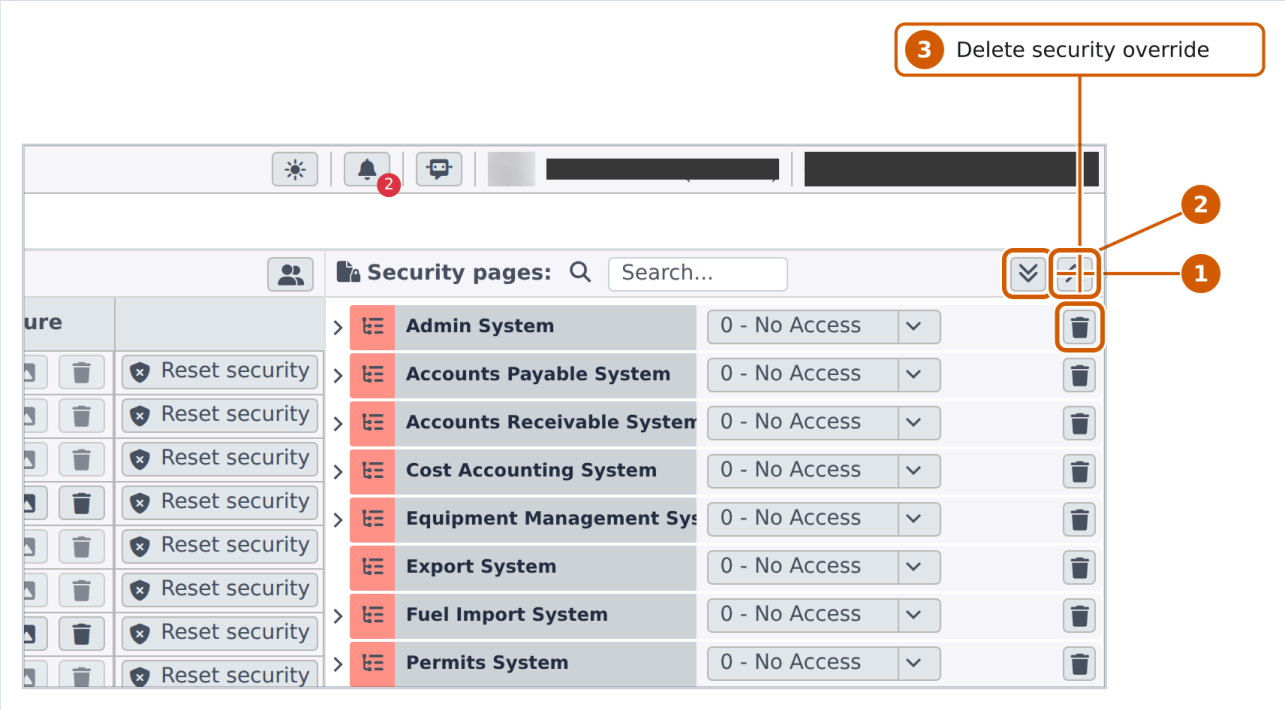


Security Administration opens on the Set Security by User tab, with the IRIS users grid on the left.

1. Set Security by User
2. Set Security by Screen
3. Set Report Access
4. Copy user security data
5. IRIS users grid
6. Select a user

3. Click anywhere in a user's row.

   The row is selected. The right-hand side shows **Security pages:** for that user, with a search box and the **Expand all** and **Collapse all** buttons.



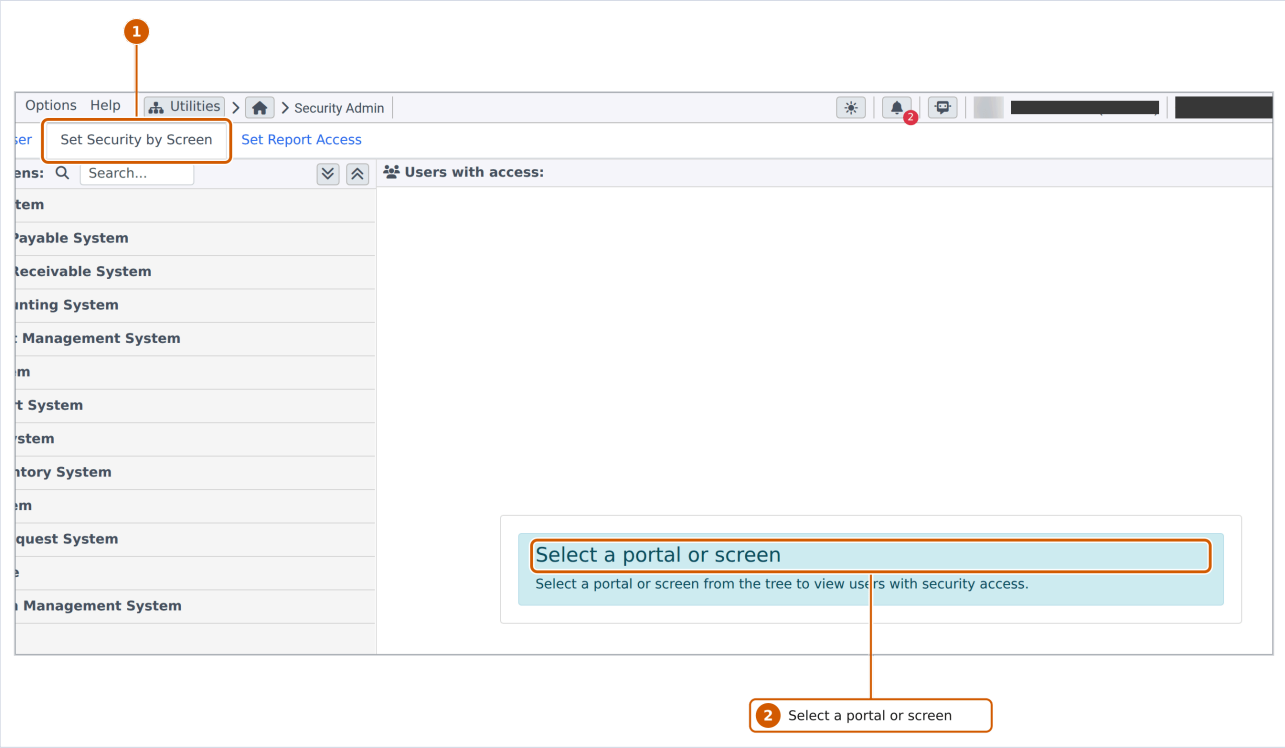
After you select a user, Security pages shows that user's portals with a level and a Delete security override button for each.

1. Expand all
2. Collapse all
3. Delete security override

See and change who has their own level on a portal or screen

1. Click the **Set Security by Screen** tab.

   The tab shows **Portals & screens:** on the left and **Users with access:** on the right, with the prompt "Select a portal or screen".



The Set Security by Screen tab. Choose a portal or screen to see the users who have their own level on it.

1. Set Security by Screen
2. Select a portal or screen

2. Choose a portal or screen in the **Portals & screens:** list.

   Users with access: lists the users who have their own override on that portal or screen, sorted by name. Users who only inherit their level are not listed.

3. To change a listed user's level, choose a new level in that user's **Level** dropdown.

   IRIS asks "Change security level to \<level\> for user: \<name\>?" with **Accept** and **Cancel**.

4. Click **Accept**.

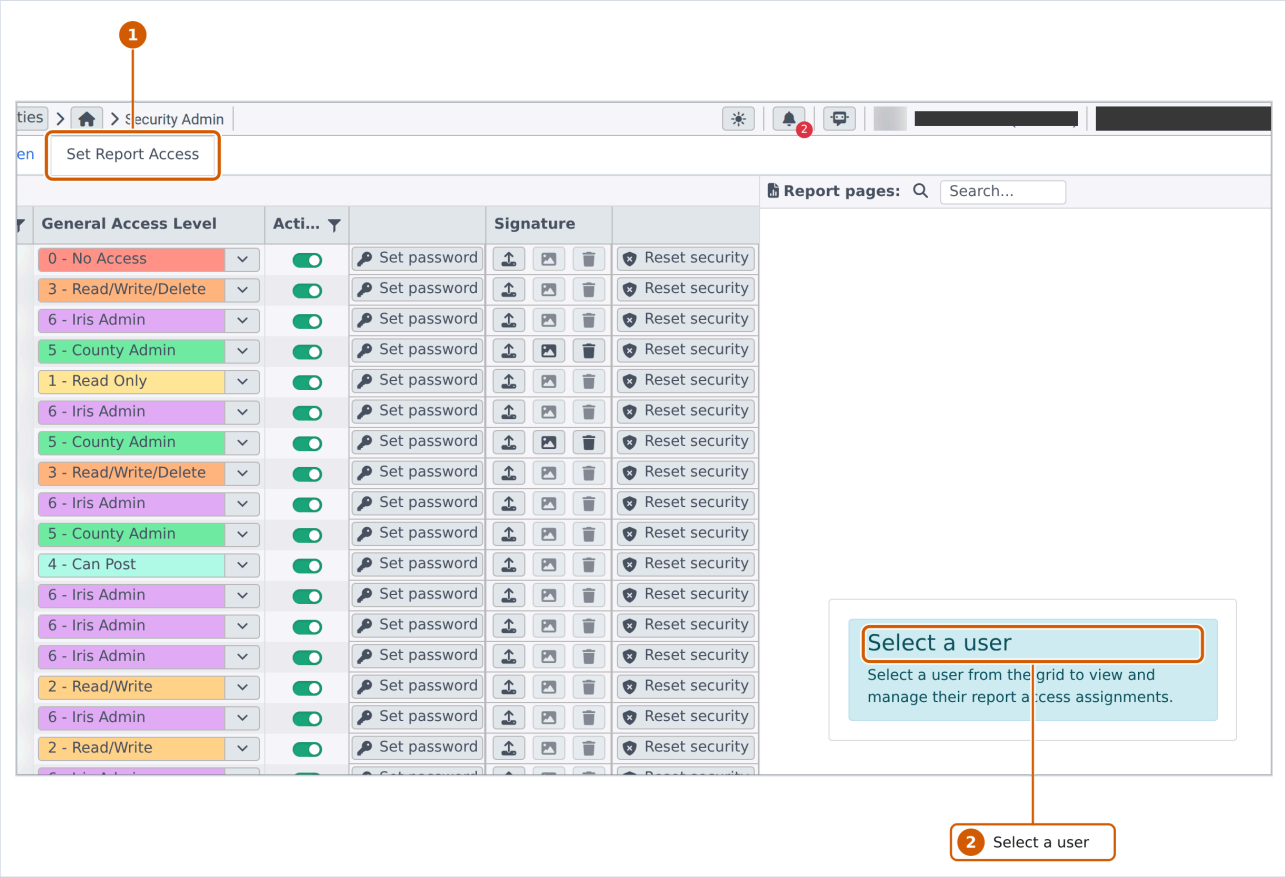
   The user's override on that portal or screen is saved at the new level.

> **Note:** To keep the current level, click **Cancel** instead.

Give or remove a user's access to a report

1. Click the **Set Report Access** tab.

   The tab shows the IRIS users grid and the prompt "Select a user".



The Set Report Access tab uses the same IRIS users grid. Select a user to see their report pages.

1. Set Report Access
2. Select a user

2. Click the user's row.

   Report pages: lists the reports, each with an on/off switch and a **Delete report access override** button. A switch is on when the user has access to that report.

3. Switch a report on to give access, or off to remove access.

   The change is saved at once, with no prompt. Switching on gives read-only access (**1 - Read Only**). Switching off sets the report to **0 - No Access** for that user.

4. To remove the user's own setting for a report so it goes back to the inherited level, click **Delete report access override** next to the report.

   IRIS asks "Are you sure you want to remove the security override for \<item\>? The effective level will revert to the portal level." with **Yes** and **No**.

5. Click **Yes**.

   The override is removed and the user's access to that report follows the portal level.

> **Note:** To keep the override, click **No** instead.

Remove a security override for a user

1. On the **Set Security by User** tab, click the user's row.

Security pages: shows the user's portals and pages, each with a level dropdown and a **Delete security override** button.

2. Find the portal or page. Use **Expand all** to show every page.

   All portals open to show their pages.

3. Click **Delete security override** next to the portal or page.

   IRIS asks "Are you sure you want to remove the security override for \<item\>? The effective level will revert to the general access level." for a portal, or "... will revert to the portal level." for a page, with **Yes** and **No**.

   > **Note:** You can click the button only when the item has its own override.

4. Click **Yes**.

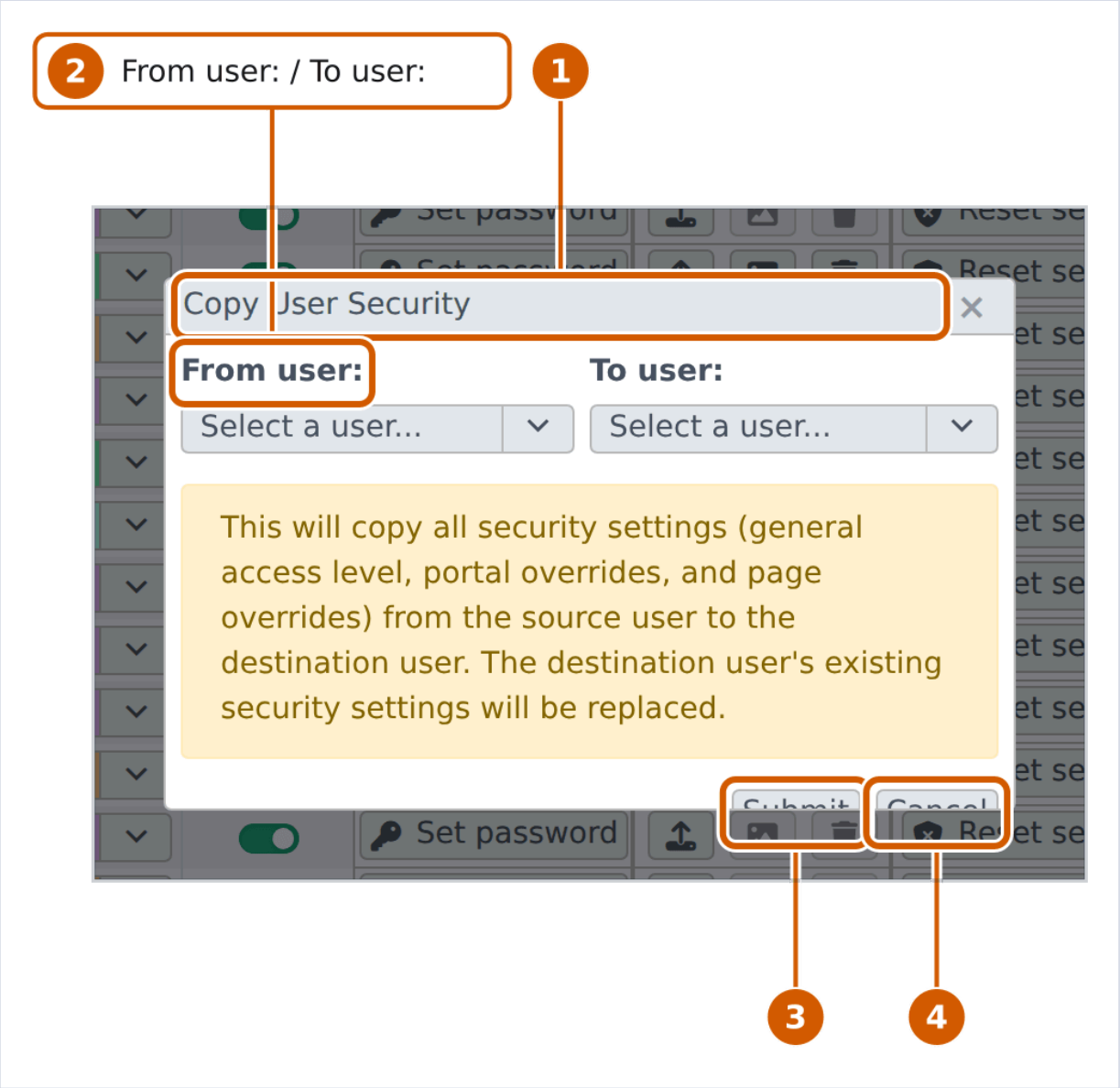
   The override is removed. A portal goes back to the user's General Access Level. A page goes back to the portal level.

   > **Note:** To keep the override, click **No** instead.

Copy security from one user to another

1. On the **Set Security by User** tab, click the **Copy user security data** button above the IRIS users grid.

   The **Copy User Security** window opens with **From user:** and **To user:** lists and **Submit** and **Cancel** buttons.



The Copy User Security window. The To user's existing security settings are replaced, and the copy cannot be undone.

1. Copy User Security
2. From user: / To user:
3. Submit
4. Cancel

2. Read the warning in the window.

   The window states that all security settings (general access level, portal overrides and page overrides) are copied from the source user and that the destination user's existing settings are replaced.

3. In **From user:**, choose the user whose security you want to copy. You can type to filter the list.
4. In **To user:**, choose the user who should receive that security.

> **Note:** The two users must be different. If either list is empty, IRIS shows "Please select both a source and destination user."

5. Click **Submit**.

   The window closes. IRIS shows "\<From\>'s security settings have been copied to \<To\>." The To user now has the From user's General Access Level and all of the From user's portal, page and report-access overrides. All of the To user's previous overrides are gone. This cannot be undone.

> **Note:** To close the window without copying, click **Cancel** instead.

Reset a user's security

1. On the **Set Security by User** tab, find the user in the IRIS users grid and click the **Reset security** button in that user's row.

   IRIS asks "Warning! Are you sure you want to reset the users security settings? This action cannot be undone." with **Yes** and **No**.
2. Click **Yes**.

   All of the user's portal, page and report-access overrides are deleted and the trees reload. The user's General Access Level stays, so the user's access now follows it everywhere. This cannot be undone.

> **Note:** To cancel the reset, click **No** instead.

Make a user active or inactive

1. In the IRIS users grid, click the **Active** switch in the user's row.

   The change is saved at once. If it cannot be saved, the switch goes back to its previous position and, in most cases, an error message appears.

Set a user's password

1. In the IRIS users grid, click the **Set password** button in the user's row.

   The **Set password** window opens. If the user has an email address, it shows **Create New Password** and **Confirm Password**. If the user has no email address, only an email form shows, with the message "The selected user does not have an email address assigned. Please assign an email address to this user before setting a password."

> **Note:** If the email form shows, complete steps 2 to 4 first. Otherwise, go to step 5.

2. Type the user's email address in the **Email Address** box.
3. Click **Submit**.

   IRIS shows "Email updated successfully." If the email cannot be saved, IRIS shows an error message.
4. Click **Ok** on the success message.

The **Create New Password** and **Confirm Password** boxes appear.

5. Type the new password in **Create New Password**.

   The checks below the box update as you type: 8 to 30 characters; **Contains uppercase character**; **Contains a digit**; **Contains special character**; and that the password does not contain `.` `;` `'` or `@`.

6. Type the same password in **Confirm Password**.
7. Click **Submit**.

   IRIS shows "Password updated successfully." If the password cannot be saved, IRIS shows an error message.

Manage a user's signature

1. In the IRIS users grid, use the upload button in the **Signature** column of the user's row to add a signature.
2. To see the signature, click the view button in the **Signature** column.

   > **Note:** View and delete are unavailable when the user has no signature.

3. To remove the signature, click the delete button in the **Signature** column.

   IRIS asks "Are you sure you want to delete the signature for user: \<name\>?"

Reference

Security levels

LEVEL SHOWN IN IRIS	WHAT IT MEANS FOR THE USER
0 - No Access	No access to the portal, page or report.
1 - Read Only	Can open the page and view it. This is also the highest level any report can have.
2 - Read/Write	Adds editing records in grids. Whether **Add** appears depends on each screen's own add level.
3 - Read/Write/Delete	Adds deleting records in grids.
4 - Can Post	Adds menu items such as Post, Approve and Void.
5 - County Admin	Can open Security Administration and manage the county's users.
6 - Iris Admin	System Administrator level, held only by the IRIS development and support team. County administrators should not choose it.

Which level applies to a page

ORDER	LEVEL USED	SHOWN AS SOURCE
1	The user's own override on the page	`page`

ORDER	LEVEL USED	SHOWN AS SOURCE
2	Otherwise, the user's own override on the portal	`portal`
3	Otherwise, the user's General Access Level	`generalaccess`

IRIS users grid

COLUMN OR CONTROL	WHAT IT DOES
Name, **Email**, **Employee**	Identify the user. You can filter these columns.
General Access Level	The user's base level for this county. It applies wherever there is no override.
Active	On/off switch. It saves as soon as you click it.
Set password	Opens the **Set password** window.
Signature	Upload, view and delete buttons for the user's signature.
Reset security	Removes all of the user's overrides after a warning.
Copy user security data (above the grid)	Opens the **Copy User Security** window.

Messages you may see

MESSAGE	WHEN IT APPEARS
You do not have the required security level to access Security Administration.	You open Security Administration with a General Access Level below 5.
Change security level to \<level\> for user: \<name\>?	You change a **Level** on the **Set Security by Screen** tab (**Accept** or **Cancel**).
Are you sure you want to remove the security override for \<item\>? The effective level will revert to the general access level.	You delete a portal override (**Yes** or **No**).
Are you sure you want to remove the security override for \<item\>? The effective level will revert to the portal level.	You delete a page or report override (**Yes** or **No**).
Please select both a source and destination user.	You click **Submit** in **Copy User Security** without both users.
Source and destination users must be different.	You choose the same user in **From user:** and **To user:**.
\<From\>'s security settings have been copied to \<To\>.	A copy succeeded.
Warning! Are you sure you want to reset the users security settings? This action cannot be undone.	You click **Reset security** (**Yes** or **No**).
Email updated successfully.	You saved an email address in the **Set password** window.
Password updated successfully.	You saved a new password.

MESSAGE	WHEN IT APPEARS
Are you sure you want to delete the signature for user: \ <name\>?	You click the signature delete button.

Tips and notes

Important: Copy User Security replaces the To user's General Access Level and all of their portal, page and report-access overrides with the From user's. The copy cannot be undone, so check both names before you click **Submit**.

Important: Reset security cannot be undone. It removes every override for the user but keeps the General Access Level, so the user's access everywhere then follows that level.

Note: Set Security by Screen lists only users who have their own override on the chosen portal or screen. Users who inherit their level from a portal or their General Access Level are not listed. Use **Set Security by User** to see their level.

Note: Report access is always read only. Turning a report on gives **1 - Read Only**, however high the user's other levels are.

Note: Report access switches and the **Active** switch save as soon as you click them. There is no confirmation prompt.

Tip: Delete security override is available only on items where the user has their own override. If the button is greyed out, the item is inheriting its level.

Note: Security changes, including copies, apply to the county you are signed in to.

Note: Menu and toolbar items that need a higher level than the user has are hidden, not greyed out. For example, Post, Approve and Void need **4 - Can Post**.

Note: 6 - Iris Admin is the System Administrator level for the IRIS development and support team. Do not choose it for county users.

Related topics

- Security Administration: access levels by user
- Navigating portals and pages
- Data grid overview and basics
- Grid filters
- Logging in

User defined fields

Overview

Each form (screen) has ten user fields. You name and type them in the User Defined Fields window. The label you set becomes the column heading, editor label and filter name wherever the field appears. Grid column headings and editor labels are described in Grid viewing and editing. Filter names are described in Grid filters.

Before you begin

- Sign in to IRIS10.
- Make sure you have access to the User Defined Fields screen in the Utilities portal. To reach the Utilities portal, see Navigating portals and pages.
- Make sure you have edit access to User Defined Fields if you need to save changes. Access to view and edit User Defined Fields is granted as described in Security Administration: access levels by user.
- To use a user-defined lookup value list as the source for a Lookup field, see Lookup values.

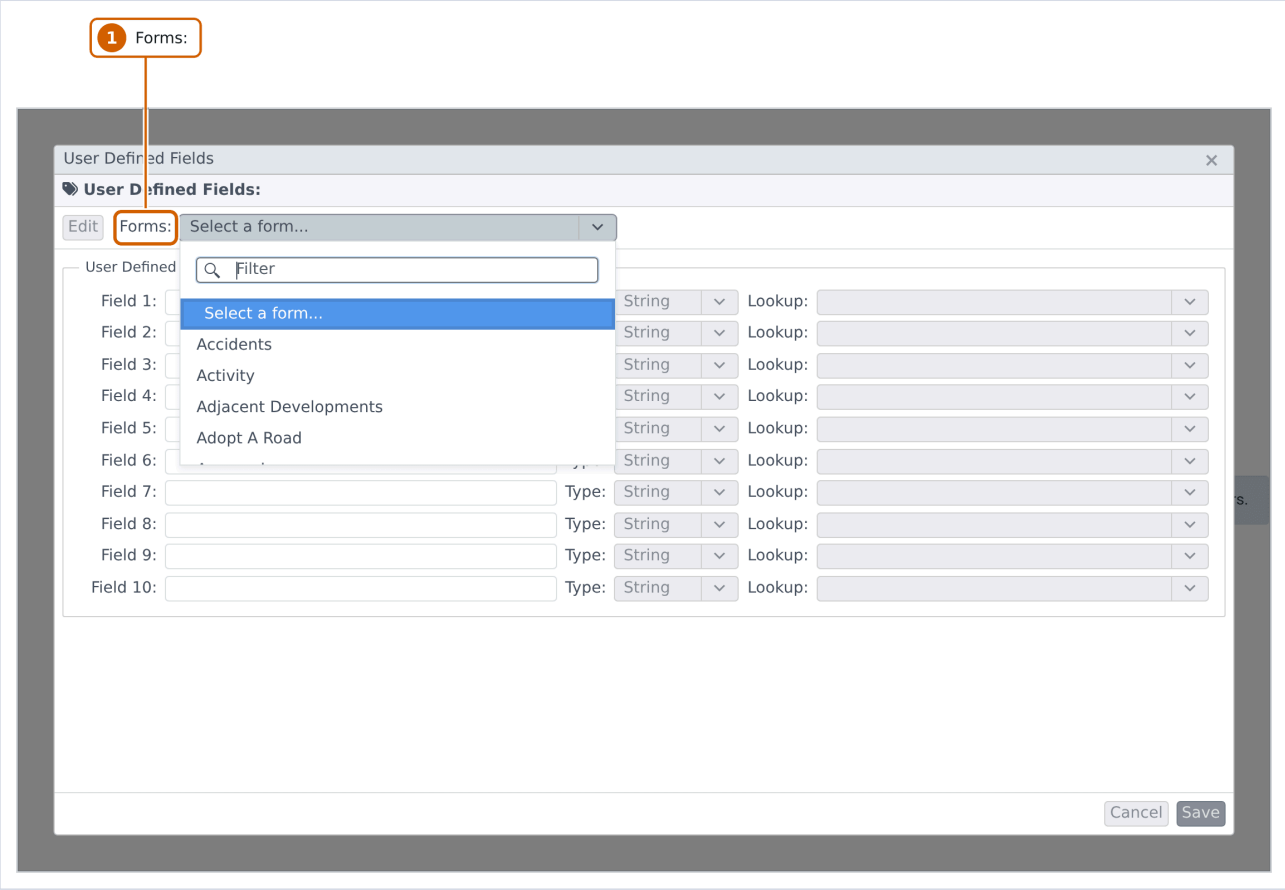
Procedure

Open the User Defined Fields window

1. In the Utilities portal, open the User Defined Fields screen. The screen shows the text "Name and type the ten user fields available on a screen...", and the User Defined Fields window opens by itself.
2. If you closed the window, click **Manage User Defined Fields**. The User Defined Fields window opens again with the form you chose last time, so **Edit** may already be available.

View the user fields for a form

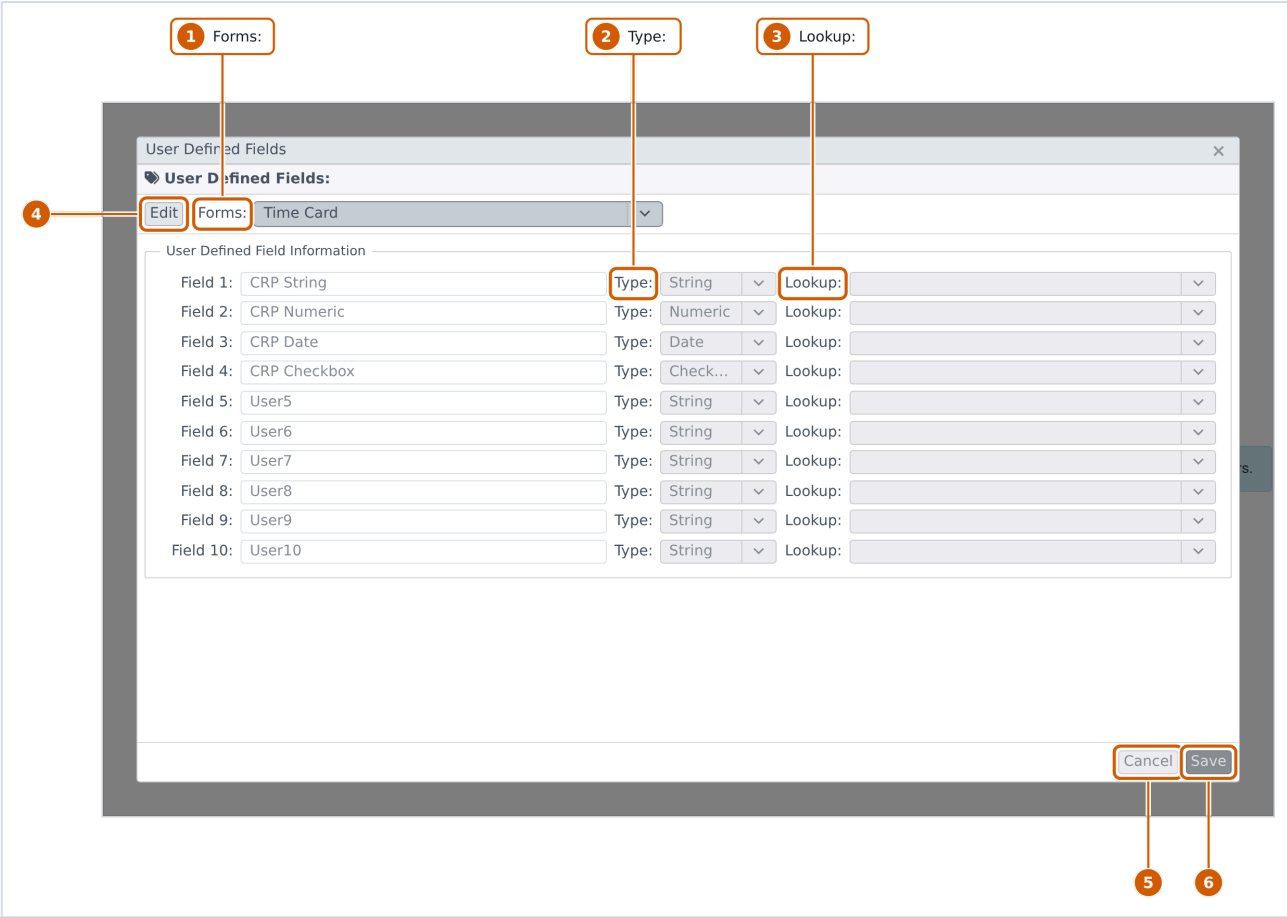
1. In the window, click the **Forms:** list. The list opens. Before you choose anything, it shows `Select a form...`.



The Forms: list includes every screen that has user fields, sorted alphabetically. Type to filter it.

1. **Forms:** Type part of a name to filter the list.

2. Type part of the screen name to filter the list, then choose the form. The list shows only the forms whose names contain what you typed.
3. Review the ten rows, **Field 1:** to **Field 10:**, each with a label, a **Type:** and a **Lookup:**. The form's saved labels, types and lookups appear read-only. **Edit** becomes available, but **Cancel** and **Save** stay unavailable.



The User Defined Fields window with the Time Card form chosen. Each of the ten fields shows its label, Type: and Lookup:. Click Edit to make changes.

1. **Forms:** Choose the screen whose user fields you want to see.
2. **Type:** String, Numeric, Date, Checkbox or Lookup.
3. **Lookup:** Available only when the type is Lookup.
4. **Edit**
5. **Cancel**
6. **Save**

Name and type user fields

1. Choose the form in **Forms:**. The form's fields load and **Edit** becomes available.
2. Click **Edit**. The label and **Type:** boxes become editable, **Cancel** and **Save** become available, and you can't change the **Forms:** list until you save or cancel.

> **Note:** Users with view-only access can also click **Edit**, but they can't save their changes (see step 7).

3. In the box next to **Field N:**, type the label you want users to see. A label can be up to 30 characters. Leading and trailing spaces are removed when you save.
4. Choose the field's type in **Type:**. If the new type is different from the field's stored type, a warning says existing values may become unreadable and won't be converted. On a form

that has never been set up, every field is stored as String, so any other type shows the warning.

5. If the type is Lookup, choose the list of values in **Lookup:**. Type to filter the list. **Lookup:** is available only for that row while its type is Lookup. If you change the type to anything else, the lookup is cleared.
6. Repeat steps 3 to 5 for each field you want to change.
7. Click **Save**. A success message says grids and filters will show the new labels the next time a screen is loaded. The window then reloads the form and returns to read-only. A label left blank is saved as `User` plus the field number (for example `User3`).

> **Note:** If the save fails, including when you have view-only access, `The user defined fields could not be saved.` appears.

Cancel changes

1. While editing, click **Cancel**. Your unsaved changes are discarded, the last loaded labels, types and lookups come back, and the window returns to read-only.

Reference

Field types

TYPE	NOTES
String	Text. On a form that has never been set up, every field is String.
Numeric	Numbers.
Date	Dates.
Checkbox	A checkbox (yes or no).
Lookup	The value comes from the list chosen in **Lookup:**. This is the only type that keeps a lookup.

Lookup sources

SOURCE	WHAT USERS CAN PICK
IRIS10 lookup tables (listed by description)	Active records only
User-defined lookup value lists (listed by list name)	The values in that list, with a blank first entry

Defaults for a form with no saved setup

FIELD	DEFAULT LABEL	DEFAULT TYPE
Field 1: to **Field 10:**	`User1` to `User10`	String

Button states

SITUATION	EDIT	CANCEL	SAVE	FORMS:
No form chosen	Unavailable	Unavailable	Unavailable	Available
Form chosen (read-only)	Available	Unavailable	Unavailable	Available
Editing	Unavailable	Available	Available	Locked

Messages

MESSAGE	WHEN IT APPEARS
`Unable to load the User Defined Fields window.`	The window's contents couldn't load.
`Could not load the user defined fields for <name>.`	The chosen form's setup couldn't load. The message shows the screen's internal name, not its display name.
`The user defined fields could not be saved.`	Any failed save, including when you have view-only access. It isn't only a connection problem. The message may add `IRIS Support has been notified.` or more detail about the error.

Tips and notes

Important: If you change a field's type to something other than its stored type, existing values aren't converted and may become unreadable. On a form that has never been set up, every field is stored as String.

Note: New labels appear in grids and filters the next time a screen is loaded. Reopen any screen that is already open to see them.

Tip: A form doesn't need to be set up already to appear in **Forms:**. Every screen that has user fields is listed, sorted alphabetically.

Note: If you leave a label blank, IRIS10 saves it as `User` plus the field number (for example `User3`).

Tip: The window remembers the last form you chose, so when you reopen it, that form is already loaded.

Related topics

- Grid viewing and editing
- Grid filters
- Lookup values

- Security Administration: access levels by user
- Navigating portals and pages

Units of measure, fiscal years and organizations

Overview

The UOM, Fiscal and Organization screens hold reference data that other parts of IRIS10 use. You use them to maintain units of measure, look up fiscal years and maintain organization records.

MENU CATEGORY	MENU ITEM	SCREEN HEADER
Lookup Values Screens	Units Of Measure	UOM
System Setup	Fiscal Year	Fiscal
System Setup	Organization	Organization

For the Lookup Values Screens menu category, see Lookup values. To reach the menu categories, see Navigating portals and pages.

In this topic you learn how to:

- Add and maintain the units of measure your department uses, with English and metric names.
- Look up fiscal years and their begin and end dates.
- Add and maintain your organization records, including contact details.
- Understand what the default organization is, and that only one organization can be the default.
- Choose a different organization for your current session.

This topic is for administrators, inventory and asset managers, and supervisors.

Before you begin

- Sign in to IRIS10. See Logging in.
- Make sure you have access to the Utilities screens. Access is granted through Security Administration. See Security Administration: screens, reports, copying and resetting.
- Be familiar with the shared IRIS10 data grid, including adding, editing and saving rows. See Grid viewing and editing.

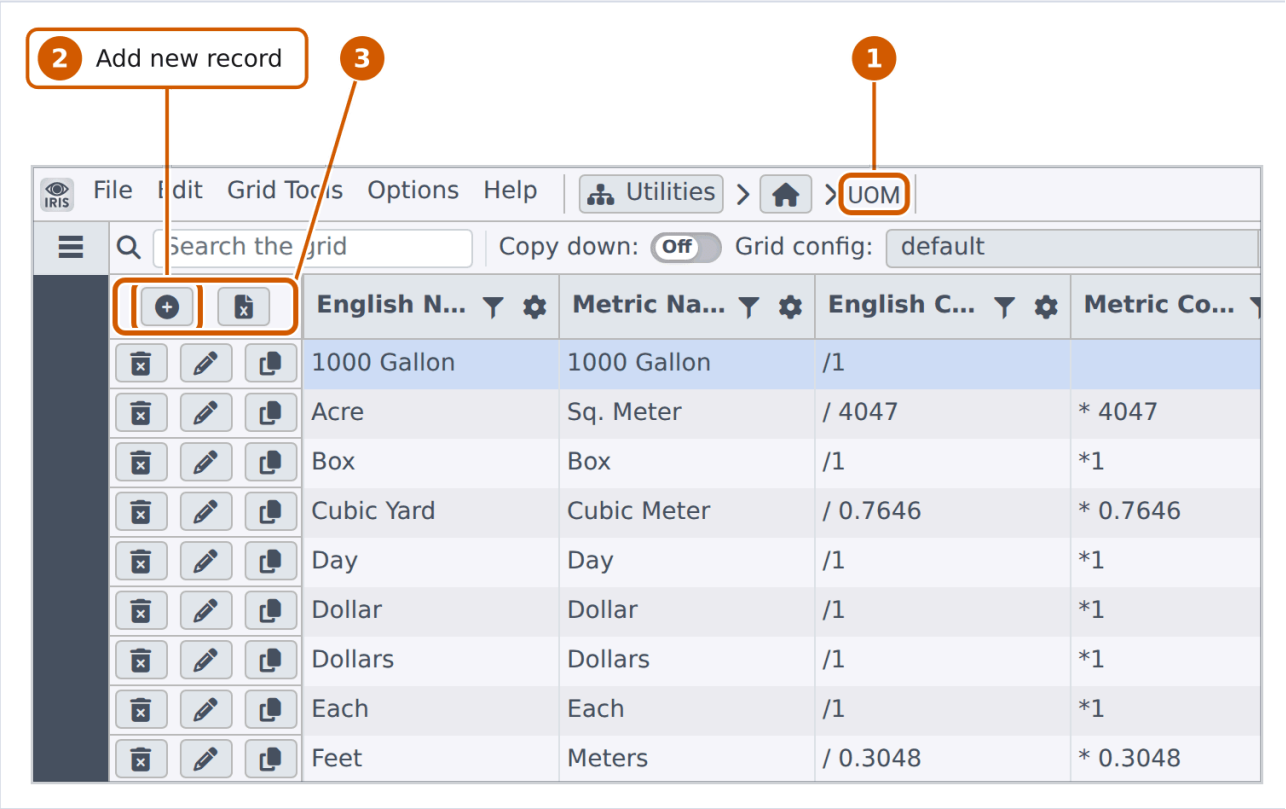
Procedure

Add a unit of measure

1. Open the main menu and, under **Lookup Values Screens**, select **Units Of Measure**. The screen header reads **UOM**. The grid lists units of measure sorted by **English Name** from A

to Z.

> **Note:** Units of measure are covered by the Utilities security area. If you cannot see the menu item or the add button, ask your administrator about your access.



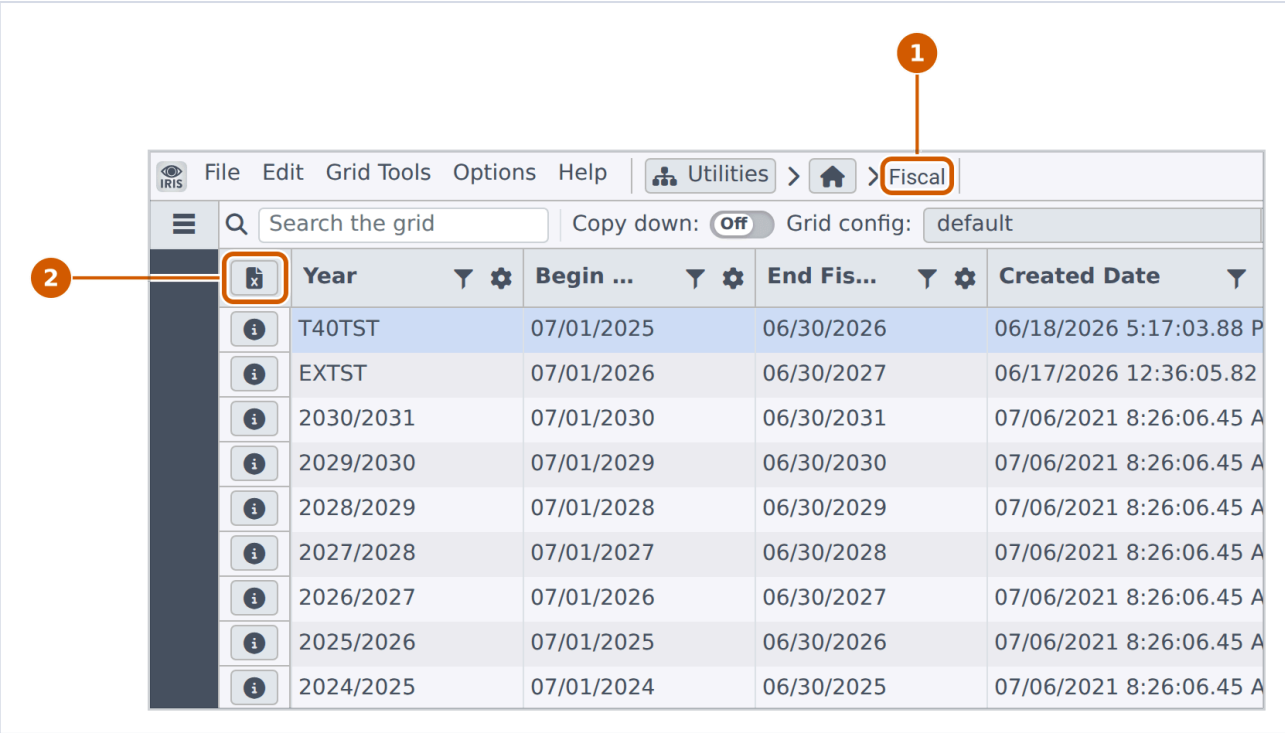
The UOM screen lists units of measure by English Name. Use Add new record to create a new unit.

1. Screen header: UOM
2. Add new record
3. Grid columns

2. Click the add button (tooltip: "Add new record. (ctrl+shift+a)"). An editor titled **UOM** opens with the **UOM Info** section.
3. In **English Name**, type the English name of the unit. You can enter up to 20 characters. If you leave the field empty, IRIS10 shows a message that the field is required.
4. In **Metric Name**, type the metric name of the unit. You can enter up to 20 characters. **Metric Name** is required.
5. If needed, fill in **English Conversion Factor** and **Metric Conversion Factor**. Each is optional and allows up to 50 characters.
6. Click **Save**. The new unit of measure is kept. IRIS10 keeps a new record only after you click **Save**.

Look up a fiscal year

1. Open the main menu and, under **System Setup**, select **Fiscal Year**. The screen header reads **Fiscal**. The grid lists fiscal years sorted by **Year** with the most recent first.



The Fiscal screen lists fiscal years with the most recent first, along with their begin and end dates.

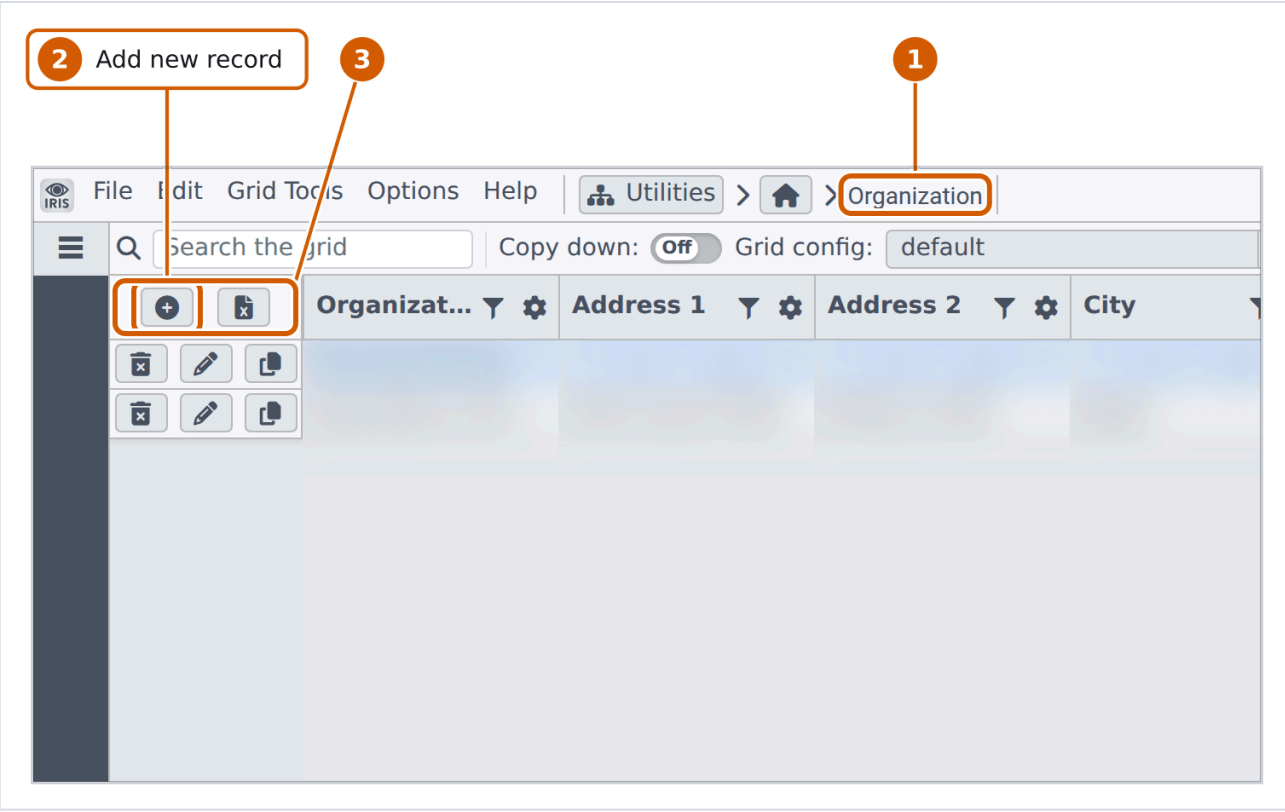
1. Screen header: Fiscal
2. Year, Begin Fiscal and End Fiscal columns

2. Find the fiscal year you need and read its **Begin Fiscal** and **End Fiscal** dates. Dates are shown in `MM/dd/yyyy` format.
3. Click the info button on the row. A window opens with the details of the fiscal year you selected.

Add an organization

1. Open the main menu and, under **System Setup**, select **Organization**. The screen header reads **Organization**. The grid lists organizations sorted by **Organization Name** from Z to A.

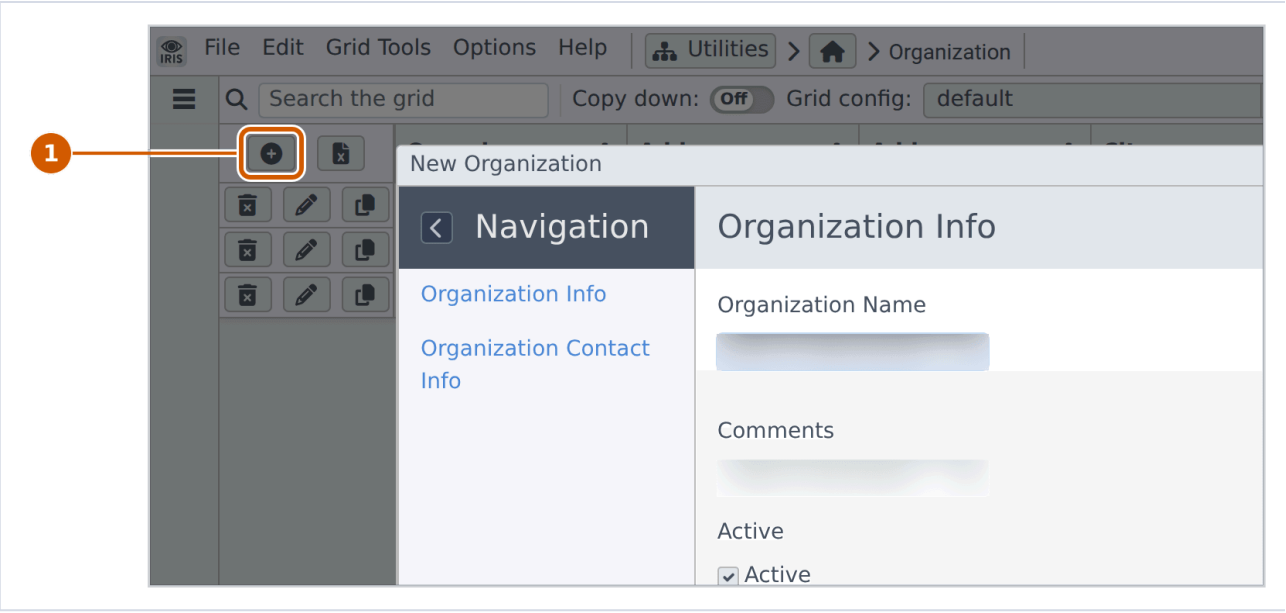
> **Note:** Organizations are covered by the Utilities security area. If you cannot see the menu item or the add button, ask your administrator about your access.



The Organization screen lists your organizations with their contact details, Default Organization and Active columns.

1. Screen header: Organization
2. Add new record
3. Grid columns

2. Click the add button (tooltip: "Add new record. (ctrl+shift+a)"). An editor titled **Organization** opens. Its required section is **Organization Info**.



The Organization editor groups the fields into Organization Info and Organization Contact Info.

1. Opened with Add new record

3. In **Organization Name**, type the organization's name. You can enter up to 50 characters. **Organization Name** is required.
4. In the **Organization Contact Info** section, fill in the contact fields you need: **Address 1**, **Address 2**, **City**, **State**, **Zip Code**, **Phone Number**, **Fax Number**, **E Mail** and **Website**. **State** accepts 2 characters, **City** 30, **Zip Code** 10, **Phone Number** and **Fax Number** 14 each, and **Address 1**, **Address 2**, **E Mail** and **Website** 50 each.
5. In the **Organization Info** section, fill in **UNC Caller ID**, **Comments** and **ARS Invoice Number Prefix** if they apply. **UNC Caller ID** accepts up to 10 characters, **Comments** up to 256 and **ARS Invoice Number Prefix** up to 2.
6. Leave **Active** ticked if the organization is in use. On a new record, **Active** is ticked by default.
7. Tick **Default Organization** only if this organization should be the default and no other organization is the default already. If another organization is already the default, this message appears: `The organization "<name>" is already set as the default. You cannot set another one.` The checkbox is then cleared. If IRIS10 cannot check for an existing default, it also clears the checkbox.
8. Click **Save**. The new organization is kept. IRIS10 keeps a new record only after you click **Save**.

Choose a different organization for your session

1. From the main menu, select **Edit** > **Organization**. The **Choose Organization** window opens.
2. Check which organization you are using now. The window shows "Currently selected organization: " and a list of your organizations sorted by name from A to Z.

> **Note:** The list shows only the organizations in your current county.

3. Select the organization you want to use. You can select only one.
4. Click **Confirm**. The selected organization becomes your session's organization and the window closes. If you click **Confirm** with nothing selected, the window closes.

> **Note:** To close the window without changing anything, click **Cancel** instead of **Confirm**.

Reference

Units Of Measure (UOM) grid columns

COLUMN	REQUIRED	RULES
English Name	Yes	Up to 20 characters. The grid is sorted by this column from A to Z.
Metric Name	Yes	Up to 20 characters.
English Conversion Factor	No	Up to 50 characters.
Metric Conversion Factor	No	Up to 50 characters.
Created Date, Created By, Last Updated Date, Updated By	—	Audit columns shown in the grid.

Fiscal Year grid columns

COLUMN	RULES
Year	Text, up to 9 characters. The grid is sorted by Year with the most recent first.
Begin Fiscal	Date, shown as `MM/dd/yyyy`.
End Fiscal	Date, shown as `MM/dd/yyyy`.
Created Date, Created By, Last Updated Date, Updated By	Audit columns shown in the grid.

Begin Fiscal is the first date of a fiscal year. **End Fiscal** is the last date of a fiscal year.

Organization fields

FIELD	EDITOR SECTION	REQUIRED	RULES
Organization Name	Organization Info	Yes	Up to 50 characters.
Address 1, Address 2	Organization Contact Info	No	Up to 50 characters each.
City	Organization Contact Info	No	Up to 30 characters.

FIELD	EDITOR SECTION	REQUIRED	RULES
State	Organization Contact Info	No	Up to 2 characters.
Zip Code	Organization Contact Info	No	Up to 10 characters.
Phone Number, Fax Number	Organization Contact Info	No	Up to 14 characters each.
E Mail, Website	Organization Contact Info	No	Up to 50 characters each.
UNC Caller ID	Organization Info	No	Up to 10 characters.
Logo	Organization Info	No	Image. View it with the image button. It is not included in Excel exports.
Comments	Organization Info	No	Up to 256 characters.
Default Organization	Organization Info	Yes (checkbox)	Only one organization can be the default. Not ticked by default.
ARS Invoice Number Prefix	Organization Info	No	Up to 2 characters.
Active	Organization Info	Yes (checkbox)	Ticked by default on a new record.
Created Date, Created By, Last Updated Date, Updated By	—	—	Audit columns shown in the grid.

The default organization

Default Organization is a checkbox that marks the single organization IRIS10 uses when none is given. Only one organization can be the default. If you tick **Default Organization** while another organization is already the default, IRIS10 shows: `The organization "<name>" is already set as the default. You cannot set another one.`

SITUATION	HOW THE DEFAULT ORGANIZATION IS USED
Accounts Payable payable entries	Used when no organization is given.
Accounts Receivable invoice approval	Used when no organization is given.
Signing in or switching county	Becomes your session's organization. You can change it with **Edit** > **Organization**.

Tips and notes

> **Important:** Only one organization can be the default. To make a different organization the default, first clear **Default Organization** on the current default and save that change. Then tick it on the new organization. Otherwise IRIS10 shows: `The organization "<name>" is already set as the default. You cannot set another one.`

Note: Even if the editor lets a second default through, the save is refused with the message: `Default organization already exists for this tenant.`

Tip: Picking an organization with **Edit** > **Organization** changes the organization only for your current session. It does not change the **Default Organization** setting on the **Organization** screen.

Note: New records on **Units Of Measure** and **Organization** are kept only after you click **Save**.

Tip: To add a record from the keyboard, press Ctrl+Shift+A. This is the shortcut shown in the add button tooltip.

Related topics

- Grid viewing and editing
- Navigating portals and pages
- Data grid overview and basics
- Lookup values
- Security Administration: screens, reports, copying and resetting
- Logging in

Posting timecards

Overview

Use the **Time Card** screen to check timecards against timecard rules and to post them to transactions. Posting handles labor, equipment, material and service time.

- **Validate timecard rules** checks the timecards that match the grid filter against the rules you choose. It does not post them.
- **Post timecard records** posts the timecards that match the grid filter to transactions, after you choose rules in **User Rules Selection**.

If a timecard fails, the **Posting Errors** window lists it. If timecards post but some equipment readings are held, a window opens where you correct and post the held readings.

Before you begin

- Sign in to IRIS10 and open the **Time Card** screen at `/cas/timecard`.
- Make sure you have the access level you need:
  - **2 - Read/Write** to validate from the **Validate timecard rules** toolbar button.
  - **4 - Can Post** to post, or to use the **Options** menu items.

  Administrators assign these levels. See Security Administration: access levels by user.
- Know how to filter a grid. Validate and post act on the grid's current filter. See Grid filters.

> **Important:** Validate and post include every timecard that matches the grid's current filter, not only the rows you selected. Filter the grid before you click **Ok**.

Procedure

Filter the grid to the timecards you want to process

1. Open the **Time Card** screen and apply a grid filter or search that leaves only the timecards you want to validate or post.

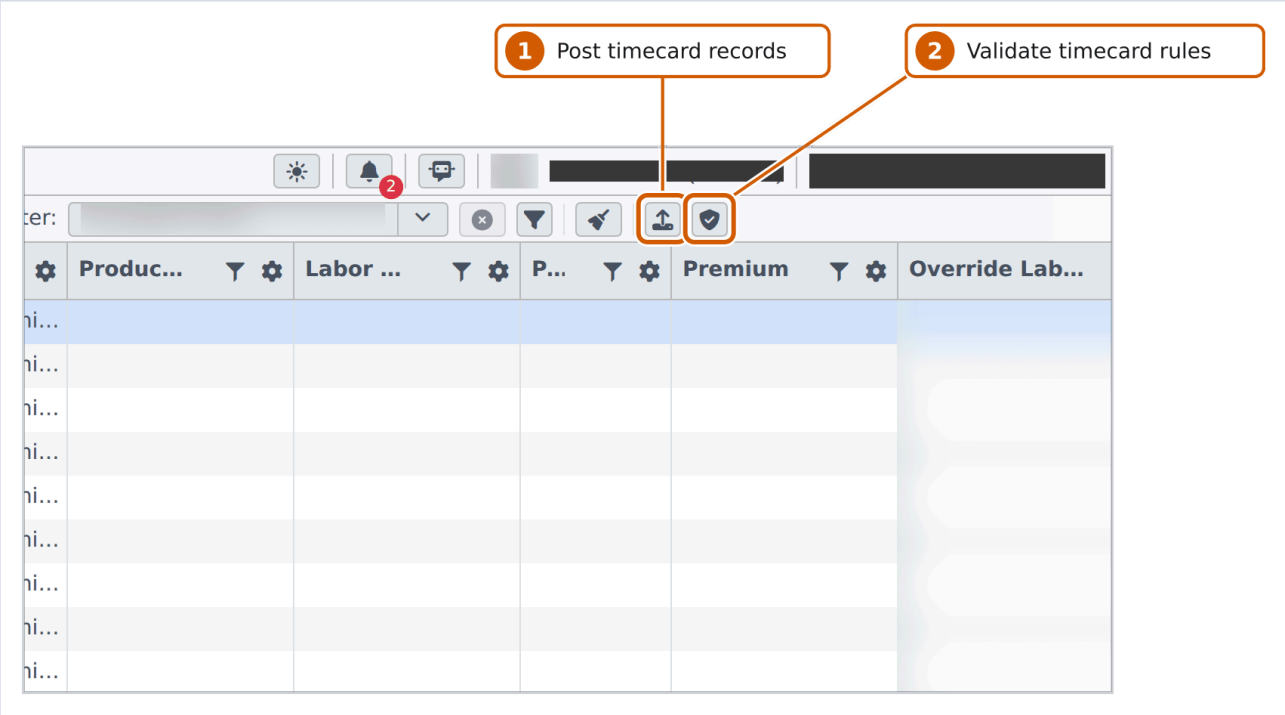
   The grid shows only the timecards you mean to process. Validate and post include every timecard that matches this filter, whether or not the row is selected.

Validate timecards without posting

1. Filter the grid to the timecards you want to check.
2. On the toolbar, click **Validate timecard rules**.

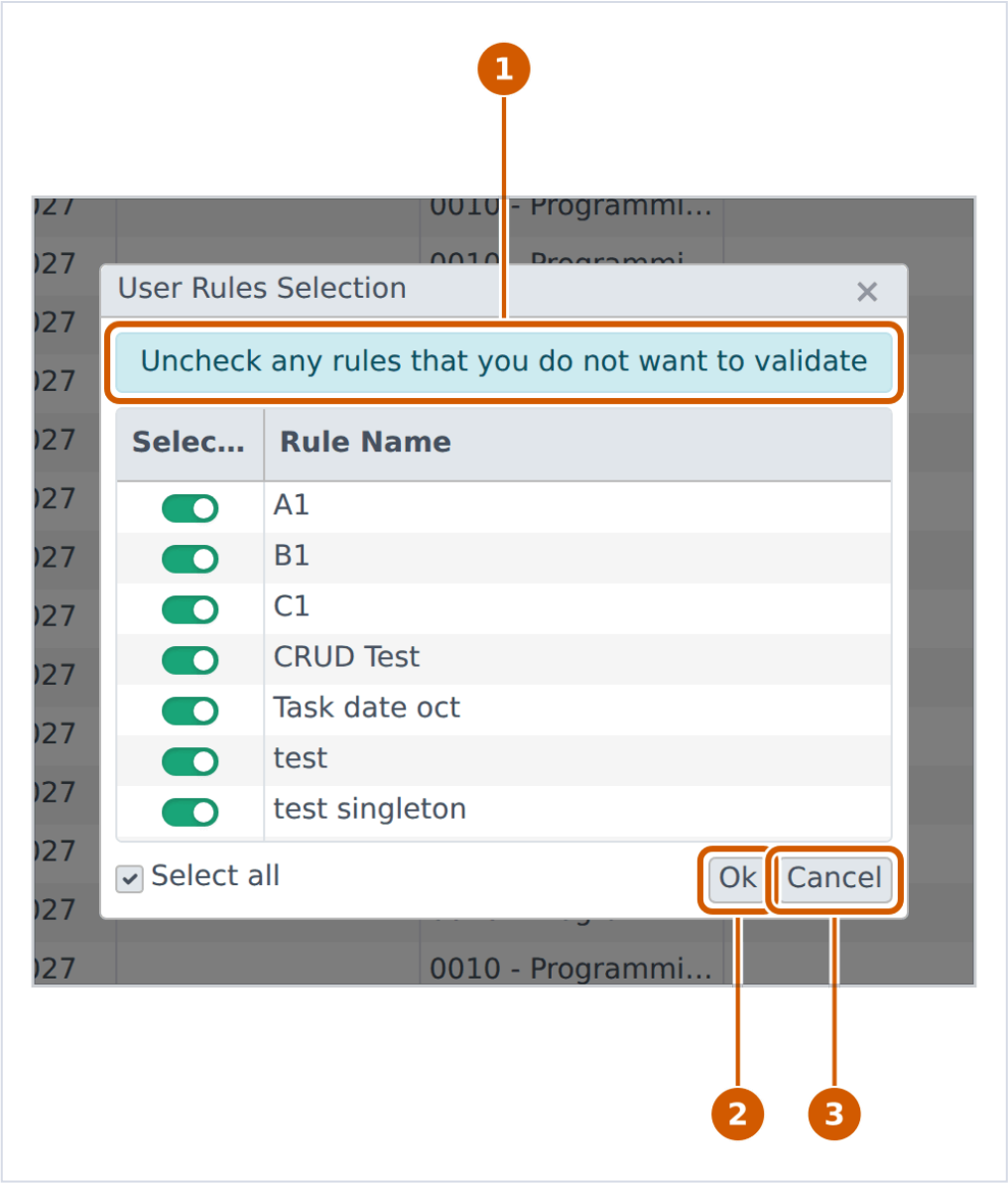
   The **User Rules Selection** window opens with the heading "Uncheck any rules that you do not want to validate".

> **Note:** The **Validate timecard rules** toolbar button needs **2 - Read/Write**. The **Options** menu item **Validate Timecard Records** needs **4 - Can Post**, so level-2 users validate from the toolbar button.



The Time Card toolbar's Validate timecard rules button checks timecards. Its Post timecard records button posts them.

1. Post timecard records: Needs 4 - Can Post
2. Validate timecard rules: Needs 2 - Read/Write



The User Rules Selection window after Validate timecard rules. Clicking Ok starts validation. Nothing is posted.

1. Uncheck any rules that you do not want to validate
2. Ok starts validation
3. Cancel

3. In the grid, clear the **Selected** switch for any rule you do not want to check.

   Only the rules you want to check stay selected.

   > **Note: Select all** is checked by default. Use it to check or clear every rule at once. For more about the rules, see Timecard rules.

4. Click **Ok**.

   The window closes and validation starts at once while a loading indicator shows. No timecards are posted.

5. Read the result.

   If no problems are found, the message "All timecard records validated successfully." appears. If any timecard fails, the **Posting Errors** window opens. The grid then refreshes. Validation does not send a notification.

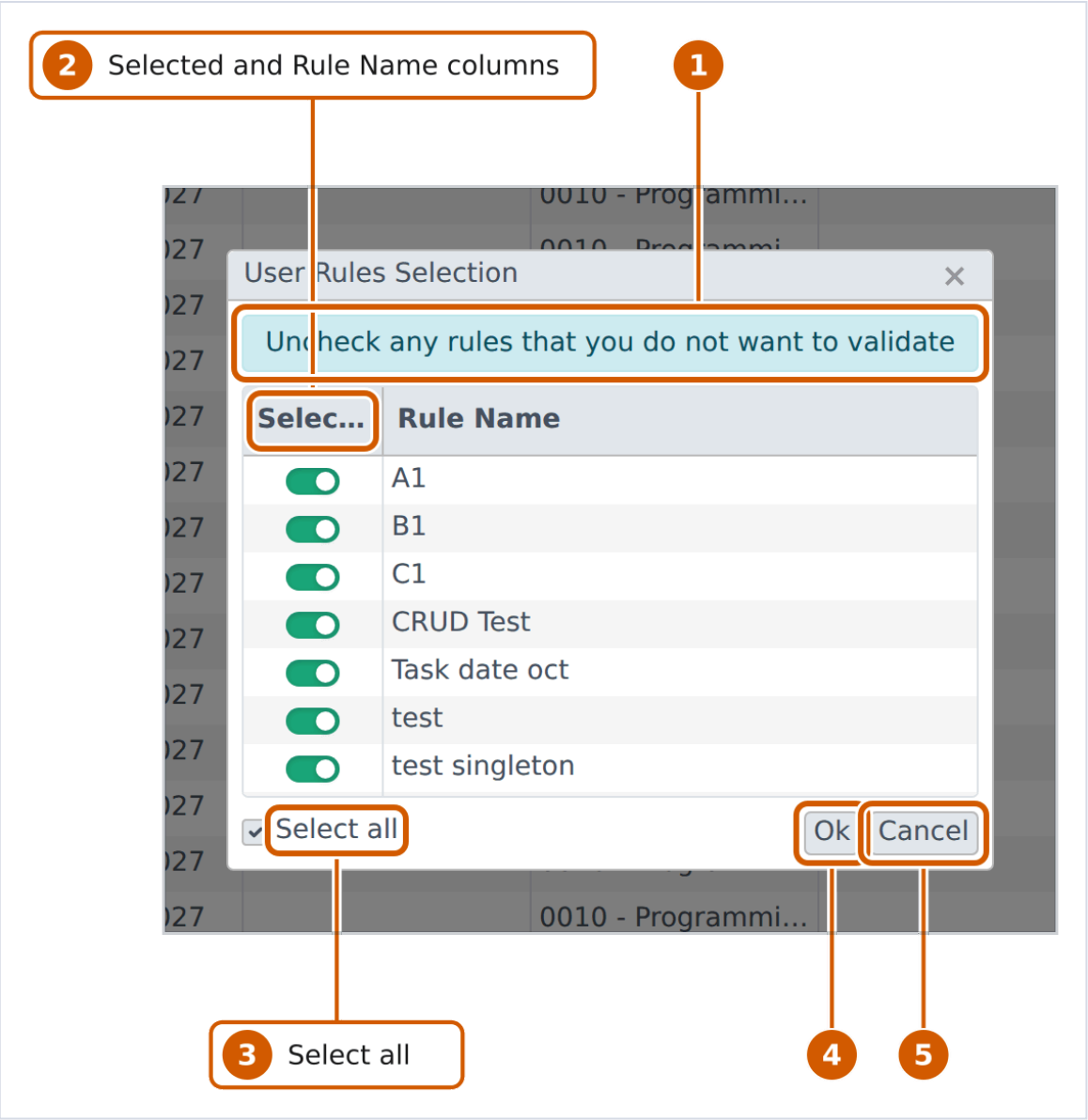
Post timecards

1. Filter the grid so it holds only the timecards you want to post.

   Every timecard that matches the filter will be posted, not only selected rows.
2. On the toolbar, click **Post timecard records**.

   The **User Rules Selection** window opens.

   > **Note:** You can also choose **Options** > **Post Timecard Records**. Posting needs **4 - Can Post**. If you have a lower level and try to post, the message "You do not have sufficient access level to perform this action." appears.



The User Rules Selection window after Post timecard records. Clicking Ok starts the post at once, with no second confirmation.

1. Uncheck any rules that you do not want to validate
2. Selected and Rule Name columns
3. Select all: Checked by default
4. Ok starts the post
5. Cancel: Shows Posting canceled.

3. Review the rules in the grid, and clear the **Selected** switch for any rule you do not want to apply.

   Only the rules you want to apply stay selected.

4. Click **Ok** to start the post.

   The post starts at once. There is no second confirmation.

> **Note:** To stop instead, click **Cancel** or close the window. "Posting canceled." appears and nothing is posted.

5. Wait for the loading indicator to close.

   The post has finished running.
6. Read the result.
   - If every timecard posts, the message "All timecard records posted to transaction successfully." appears.
   - If any timecard fails, the **Posting Errors** window opens.
   - If timecards post but some equipment readings are held, the held equipment readings window opens instead of the success message.

   The grid then refreshes. Posted timecards leave the grid and failed timecards stay on it.
7. Check your notifications for the result of the post.

   A **Timecard post** notification reports whether the post finished with no errors, finished with errors, did not finish, or lost contact. See Notifications.

Fix posting errors and post again

1. In the **Posting Errors** window, read each entry under "Timecard posting errors:".

   Each entry shows **Employee:**, **Task Date:** and **Error:**. For non-labor lines, such as equipment or material, the **Employee:** value shows that line's name.
2. To keep a copy of the errors, click **Export CSV**, **Export PDF** or **Export JSON**.

   A file named `timecard-posting-errors-<date>` is downloaded.
3. Click **Return to grid**.

   The window closes. Timecards that failed stay on the grid, each with its error message saved.
4. Correct the timecards on the grid. See Grid viewing and editing.
5. Filter the grid again if needed.

   The grid holds the timecards you want to process.
6. Validate or post again.

   Validation clears the old error message on the timecards it checks before it checks them again.

Correct and post held equipment readings

1. When the held equipment readings window opens after a post, read the summary.

   The summary reads "Timecards posted successfully. N equipment reading(s) could not be posted. Correct the values below and post them to reading history."
2. Check the **Reason Held** column for each row.

   The column shows why the reading was held.
3. Correct the **Hours** or **Miles** value in each row.

   A row's **Hours** or **Miles** cell can be edited only if that row has that meter value.

4. Click **Post readings**.

   A message asks "You are about to post N equipment reading(s) to reading history. Continue?" If a column filter hides some rows, the message warns that all rows will be posted, including hidden ones.
5. Click **Yes** to post the readings.

   If no readings are still held, the window closes with "Equipment readings posted to reading history successfully." If some are still held, the grid reloads with them and shows "N equipment reading(s) are still held. Check the reason on each row." A **Held equipment reading post** notification is sent.

To leave without posting:

1. Click **Cancel**.

   A message asks "These readings will stay held and will not post. Close anyway?"
2. Click **Yes**.

   The window closes. The readings stay held.

Reference

Access levels by entry point

ENTRY POINT	WHERE	LEVEL NEEDED
Validate timecard rules	Toolbar button	2 - Read/Write
Validate Timecard Records	**Options** menu	4 - Can Post
Post timecard records	Toolbar button	4 - Can Post
Post Timecard Records	**Options** menu	4 - Can Post

User Rules Selection window

CONTROL	WHAT IT DOES
Selected (switch)	Includes or excludes the rule in this run
Rule Name	Name of the timecard rule (read only)
Select all	Checked by default. Checks or clears every rule.
Ok	Use the selected rules for posting and validation. Starts the run at once.
Cancel	Cancel the current posting operation. Shows "Posting canceled."

What validation checks before posting

CHECK	WHAT HAPPENS
Fiscal period	A missing or out-of-range fiscal period is filled in from the timecard's task date

CHECK	WHAT HAPPENS
Billable project	Flags labor timecards on a billable project that have no billing option set: "A referenced Project is marked as billable, but some or all billing options have not been set."
Negative inventory	Flags issues that would make an item go negative where negative quantity is not allowed: "Posting this Inventory Quantity will cause Inventory to go negative."
Quantity too large	Flags material quantities that would push inventory location quantity too high ("Record could not be posted because the Quantity is too large...")
Timecard rules	A timecard that breaks a selected rule gets the rule's name as its error message. Incomplete rules are skipped.

How a timecard line posts

For more on inventory, see Posting inventory.

LINE HAS	POSTED AS	INVENTORY EFFECT
A pay type	Labor	None
Nonzero equipment quantity	Equipment (hour and mile readings are checked before they reach reading history)	None
Nonzero material quantity, stock inventory location	Material	Positive quantity is issued (Timecard Issue). Negative quantity is received back (Timecard Receipt).
Nonzero material quantity, no inventory location	Material (non-stock)	On-hand quantity does not change
Nonzero outside service quantity	Service	None
All quantities zero, no pay type	Other	None

Posting Errors window

ITEM	DESCRIPTION
Heading	Timecard posting errors:
Entry fields	**Employee:**, **Task Date:**, **Error:**
Export CSV / **Export PDF** / **Export JSON**	Exports the errors. File name `timecard-posting-errors-<date>`.
Return to grid	Return to the data grid to continue editing. Closes the window.

Held equipment readings grid

COLUMN	NOTES
Equipment	Read only
Reading Date	`MM/dd/yyyy`
Hours	Editable only if the row has an hours value
Miles	Editable only if the row has a miles value
Rollover Ceiling	Shown for reference
Reason Held	Why the reading was held

Messages you may see

MESSAGE	WHEN
All timecard records validated successfully.	Validation found no errors
All timecard records posted to transaction successfully.	Every timecard posted
Posting canceled.	**User Rules Selection** was cancelled or closed
You do not have sufficient access level to perform this action.	You tried to post without **4 - Can Post**
Unable to post timecards due to a technical error. Please contact support.	The post did not report success
Unable to post timecards due to a technical error. An email has been sent to support.	A technical error occurred and support was told
The posting request could not be completed. IRIS Support has been notified. Refresh the screen to see which records posted.	The request failed on the server. Some records may have posted.
This timecard line could not be posted. IRIS Support has been notified.	A timecard line failed for a technical reason (shown in the **Posting Errors** window)
This material line could not be posted. Check the material and inventory location fields, then post again.	A material line has an inventory location problem
You can not affect a tenant you are not logged into	You are not signed in to the agency whose timecards you tried to post

Post Timecards notifications

NOTIFICATION	SENT WHEN
Timecard post / Timecards posted	A timecard post you ran finishes (not sent for validation)
Held equipment reading post / Held equipment readings posted	A held equipment reading post you ran finishes
`<Operation>` finished with no errors.	No record returned an error

NOTIFICATION	SENT WHEN
`<Operation>` finished, but one or more records returned errors. The errors were listed on the screen when it finished.	Some timecards or readings returned errors
`<Operation>` did not finish. Try again or contact support.	The operation failed
Lost-contact message	Contact was lost. The operation may still have finished.

Tips and notes

Important: Clicking **Ok** in **User Rules Selection** after **Post timecard records** starts the post at once. There is no second confirmation.

Tip: Users with **2 - Read/Write** can check timecards with the **Validate timecard rules** toolbar button. The **Options** menu items need **4 - Can Post**.

Note: Validation does not post, but it can fill in a missing or out-of-range fiscal period on the timecards it checks, using each timecard's task date. See Units of measure, fiscal years and organizations.

Note: Each timecard posts on its own. If any part of a timecard fails, none of its transactions are kept and the timecard stays on the grid with its error message. Other timecards in the same run can still post.

Note: Posted timecards leave the **Time Card** grid and appear as transactions on the **Transact** screen. Transactions from one post share a batch number. See Transactions: void, reinstate and export.

Note: Post readings posts every row in the held readings grid, including rows that a column filter hides. The confirmation message warns you when rows are hidden.

Tip: If you see "Refresh the screen to see which records posted.", refresh the **Time Card** screen before you post again. Timecards that posted will no longer be on the grid.

Related topics

- Grid filters
- Timecard rules
- Notifications
- Grid viewing and editing
- Security Administration: access levels by user
- Transactions: void, reinstate and export
- Posting inventory

- Units of measure, fiscal years and organizations

Timecard rules

Overview

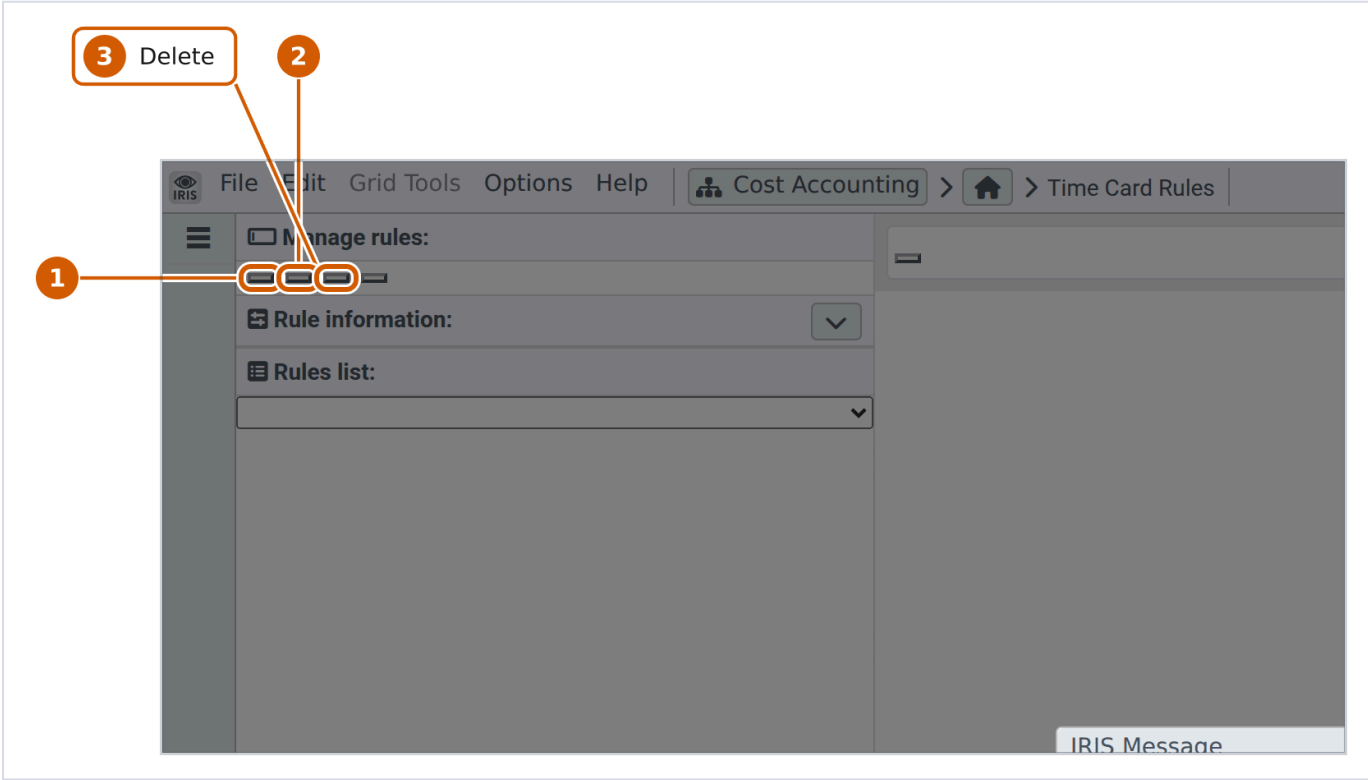
The **Time Card Rules** screen holds the user rules that IRIS10 uses when timecards are validated or posted. Each rule has two parts:

- **When** conditions, which pick the timecards the rule applies to.
- **Apply** checks.

Only rules marked **Active** are applied when you validate or post, even if they are checked in the **User Rules Selection** window.

The screen has the following layout:

- The rule management buttons and the rules list are on the left.
- A collapsible rule information panel (**Name:**, **Active**, **Description:**) is on the right.
- Two row editors are on the right. The top editor holds the **When** conditions and the bottom editor holds the **Apply** checks.



The Time Card Rules screen. Save, Save as and Delete become available once a rule is valid.

1. **Save**: Creates a new rule, or updates the selected rule.
2. **Save as**: Saves a copy of the selected rule under a new name.
3. **Delete**: Deletes the selected rule at once, with no confirmation.

Before you begin

- Sign in to IRIS10. To reach Cost Accounting screens such as **Time Card Rules**, see Navigating portals and pages.
- Make sure you have access to the **Time Card Rules** screen and the **Time Card** screen. For granting access, see Security Administration: screens, reports, copying and resetting.
- Know how timecard entry and posting work. See Posting timecards.

Procedure

Create a timecard rule

1. Open the **Time Card Rules** screen. The screen opens with the rule management buttons on the left. **Save**, **Save as** and **Delete** are unavailable until a rule is valid.
2. If a rule is selected in the rules list, click **Clear selection** (tooltip "Click to deselect a user rule."). The rule is deselected, **Name:** and **Description:** are emptied, **Active** is checked again, both editors are cleared, the information panel collapses, and **Save**, **Save as** and **Delete** are unavailable.
3. In the top editor (the **When** conditions), click the add-row button (tooltip "Click to add new row item."). A new row is added. Because no rule is selected, the rule information panel opens.
4. In the new row, choose the column.
5. In the same row, choose the operator.
6. In the same row, enter the value. If the operator needs a second value, enter it too.
7. To combine several rows, use AND/OR and grouping.
8. In the bottom editor (the **Apply** checks), click the add-row button (tooltip "Click to add new row item."). A new row is added.
9. In the new **Apply** row, choose the column.
10. In the same row, choose the operator.
11. In the same row, enter the value. If the operator needs a second value, enter it too.
12. In the rule information panel, type a name in **Name:**. **Name:** is required.
13. Type a description in **Description:**. **Description:** is required.
14. Leave **Active** checked if you want the rule applied. Clear it to keep the rule without applying it.
15. Click **Save** (tooltip "Click to save a user rule."). **Save** is available only when the information panel is complete and both editors have at least one valid row. The rule is created, the message `The user rule was successfully created.` appears for 3 seconds, and the new rule is selected in the rules list.

Change an existing rule

1. In the rules list, click the rule you want to change. The rule's name, **Active** setting, description, **When** rows and **Apply** rows load into the screen. If the rule is valid, the

information panel opens.
2. Change the **When** rows, the **Apply** rows, the name, the description or the **Active** setting.
3. Click **Save** (tooltip "Click to save a user rule."). The selected rule is updated, the message `The user rule was successfully updated.` appears, and the rule stays selected.

Copy a rule with Save as

1. In the rules list, click the rule you want to copy. The rule loads. When it is valid, **Save as** is available.
2. Click **Save as** (tooltip "Click to save a copy of an existing user rule."). The **User Rule - Save As** window opens. The **Rule name:** box holds the current name followed by a space and `(1)`.
3. Type a unique name in **Rule name:**.
4. Click **Save as** in the window. The window closes, a new rule is created under the new name, and the message `The user rule was successfully created.` appears. If the name is already in use, the message `Please enter a unique name for the rule.` appears. Click **OK** to return to the **Save As** window.
5. To stop without copying, click **Cancel** in the window. The window closes and the original rule name is restored in **Name:**.

Delete a rule

> **Important: Delete** removes the selected rule immediately. There is no confirmation prompt. Make sure the right rule is selected before you click **Delete**.

1. In the rules list, click the rule you want to delete. The rule loads and **Delete** is available.
2. Click **Delete** (tooltip "Click to delete the current selected user rule."). The system deletes the rule at once, with no confirmation. The message `The user rule was successfully deleted.` appears, the rules list reloads, and the selection and editors are cleared.

Choose rules when validating or posting timecards

1. On the **Time Card** screen toolbar, click **Validate timecard rules** or **Post timecard records**. Alternatively, choose **Validate Timecard Records** or **Post Timecard Records** from the **Options** menu. The **User Rules Selection** window opens with the banner "Uncheck any rules that you do not want to validate". It lists the timecard rules by **Rule Name**, and every rule starts checked.
2. In the **Selected** column, turn off the switch for each rule you do not want to use. Rules you turn off are not used for this run.
3. To check or uncheck all rules at once, click **Select all**. Every rule in the list becomes selected or unselected.
4. Click **Ok** (tooltip "Use the selected rules for posting and validation."). IRIS10 sends the checked rules with the validate or post request. Only checked rules that are also **Active**

are applied.

5. To stop instead, click **Cancel** (tooltip "Cancel the current posting operation.") or close the window. The message `Posting canceled.` appears.

> **Important:** Only rules marked **Active** are applied when timecards are validated or posted. The **User Rules Selection** window lists every rule, including inactive ones, and all of them start checked. Checking an inactive rule there does not apply it.

Reference

Rule management buttons

BUTTON	TOOLTIP	AVAILABLE WHEN
Save	Click to save a user rule.	The rule is valid. Creates a new rule if none is selected, otherwise updates the selected rule.
Save as	Click to save a copy of an existing user rule.	A rule is selected and valid.
Delete	Click to delete the current selected user rule.	A rule is selected and valid. Deletes at once, with no confirmation.
Clear selection	Click to deselect a user rule.	Always.

Rule information fields

FIELD	REQUIRED	DEFAULT
Name:	Yes	Empty
Active	No	Checked
Description:	Yes	Empty

Time Card screen actions

ACTION	BUTTON	OPTIONS MENU ITEM
Validate timecards	**Validate timecard rules**	**Validate Timecard Records**
Post timecards	**Post timecard records**	**Post Timecard Records**

User Rules Selection window

CONTROL	WHAT IT DOES
Selected (switch)	Turns a rule on or off for this run. All rules start checked.
Rule Name	The rule's name. Rules are listed in name order.
Select all	Checks or unchecks every rule. Starts checked.

CONTROL	WHAT IT DOES
Ok	Use the selected rules for posting and validation.
Cancel	Cancel the current posting operation. Shows `Posting canceled.`

Messages

MESSAGE	WHEN IT APPEARS
`The user rule was successfully created.`	After **Save** creates a new rule or **Save as** creates a copy.
`The user rule was successfully updated.`	After **Save** updates the selected rule.
`The user rule was successfully deleted.`	After **Delete**.
`Please enter a unique name for the rule.`	The name is already used by another rule. Click **OK** to return to the **Save As** window.
`Unable to save user rule. An email has been sent to support.`	Saving with no rows in the **When** or **Apply** editor.
`There was an error creating/updating/deleting the user rule. An email has been sent to support.`	Any other failure when saving or deleting.
`Are you sure you want to leave the user rules screen? Any unsaved changes may be lost.`	Leaving the screen with unsaved changes. Choose **Yes** or **No**.
`Posting canceled.`	Closing or canceling the **User Rules Selection** window.

Tips and notes

Note: You can save a rule only when **Name:** and **Description:** are filled in and both the **When** editor and the **Apply** editor have at least one valid row. Until then, **Save**, **Save as** and **Delete** stay unavailable.

Tip: Save as is a quick way to start a new rule from an existing one. The suggested name is the original name followed by `(1)`. Change it to something meaningful.

Note: If you leave the screen with unsaved changes, IRIS10 asks "Are you sure you want to leave the user rules screen? Any unsaved changes may be lost." Choose **No** to stay and save your work.

Tip: Each editor has a button to export its filter ("Click to export the current filter as a JSON file.") and a button to send it to IRIS support ("Click to email the filter to IRIS support."). Use them when you ask support for help with a rule.

Note: If IRIS10 rejects a save or delete, it shows its validation messages, one per line.

Related topics

- Posting timecards
- Navigating portals and pages
- Grid filters
- Cost Accounting screen tools
- Security Administration: screens, reports, copying and resetting

Posting inventory

Overview

IRIS10 has three inventory posts. Each runs from its own Cost Accounting screen.

- **Inv Receive** posts received inventory. It adds the inventory to inventory locations or sends it to Accounts Payable.
- **Inventory Transfer** posts transfers. The quantity moves from one location to another at an updated unit price.
- **Inventory Physical Count** posts counts. Each location's quantity on hand then matches what was counted.

Inventory Transactions is a read-only screen where you review posted inventory activity.

Before you begin

- Sign in to IRIS10.
- Confirm your security level. For levels, see Security Administration: access levels by user.
  - Receiving and transfer posting need **4 - Can Post** on Inventory Receiving and Inventory Transfer.
  - Physical count posting needs **2 - Read/Write** on Inventory Physical Count.
- Enter the receiving, transfer or physical count records on the screen you post from.
- Know how to filter a grid. See Grid filters.

Important: On Inv Receive, posting includes the receiving records that have not been posted yet. Review the grid before you post.

Important: On Inventory Transfer and Inventory Physical Count, posting includes every record that matches the current filter. Set the filter before you post.

Important: The number in the confirmation message may not match the number of records that IRIS posts exactly.

Procedure

Post inventory receiving records

1. Open the **Inv Receive** screen in Cost Accounting.

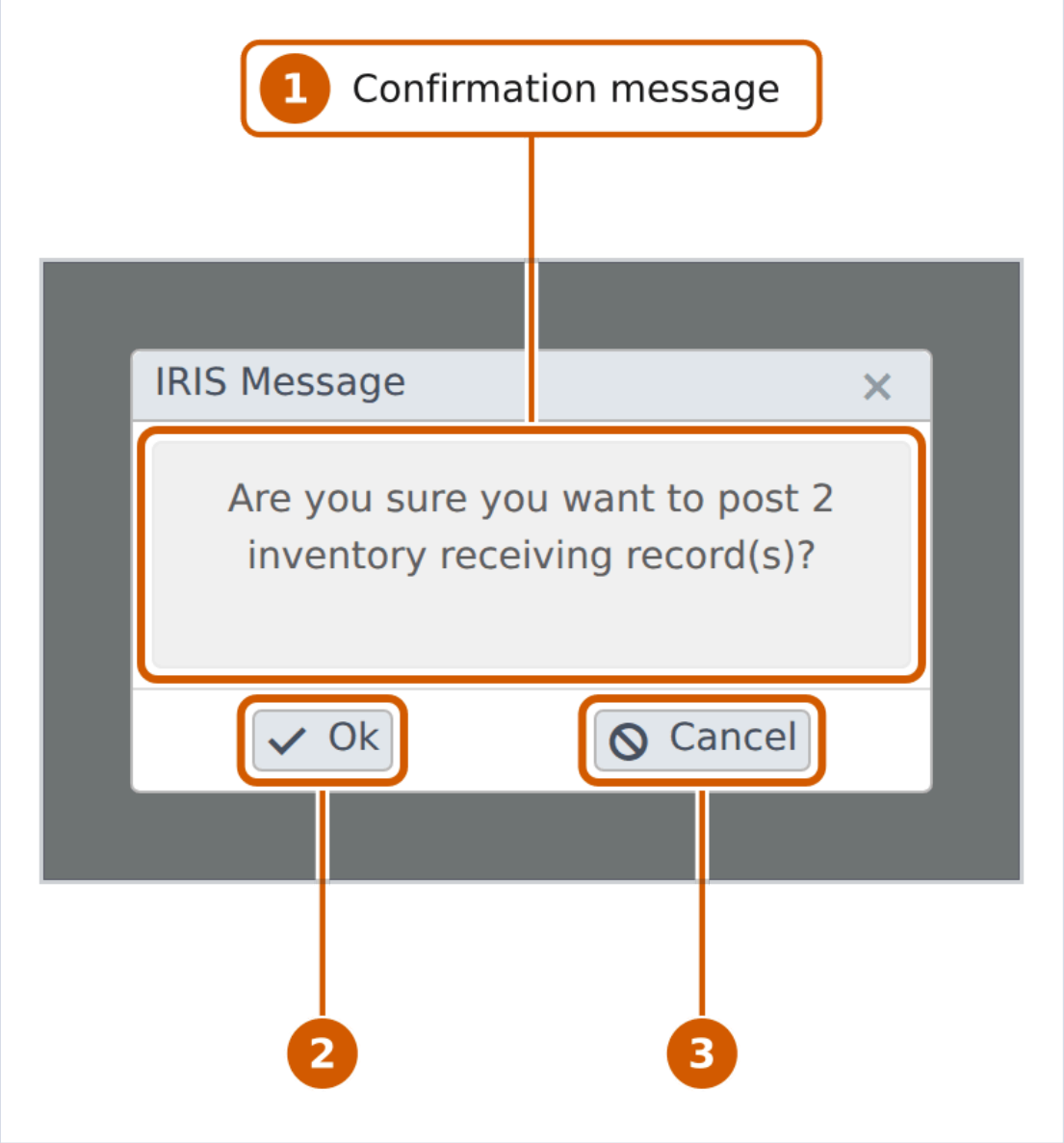
   The **Inv Receive** grid lists the receiving records.
2. Review the receiving records in the grid. Correct or remove any record that you do not want to post.

Posting includes the receiving records that have not been posted yet.

3. On the toolbar, click the button with the tooltip "Click to post Inventory Receiving records."

   An **IRIS Message** window asks "Are you sure you want to post N inventory receiving record(s)?" and shows **Ok** and **Cancel** buttons.

   > **Note:** This step requires security level 4 - Can Post on Inventory Receiving. You can also start this post from the main menu with **Options** > **Post Inventory Receiving Records**.



Clicking the post button asks you to confirm the post. Click Ok to post or Cancel to close.

1. Confirmation message
2. Ok posts the records
3. Cancel closes without posting

4. Click **Ok** to post the records. To close the window without posting, click **Cancel**.

If the post succeeds, IRIS shows "Inventory receipts posted successfully." and reloads the grid. If IRIS could not post some records, it reports that.

5. Check the grid.

   The grid no longer lists the receiving records that posted. Records that IRIS could not post remain in the list.

6. Check your notifications. See Notifications.

   You find the **Inventory receipts posted** notification. If the post did not succeed, you find a notification titled **Inventory receiving post finished with errors**, **Inventory receiving post failed** or **Inventory receiving post result unknown**.

Post inventory transfer records

1. Open the **Inventory Transfer** screen in Cost Accounting.

   The **Inventory Transfer** grid lists the transfers. Each transfer has a grid of transfer details.

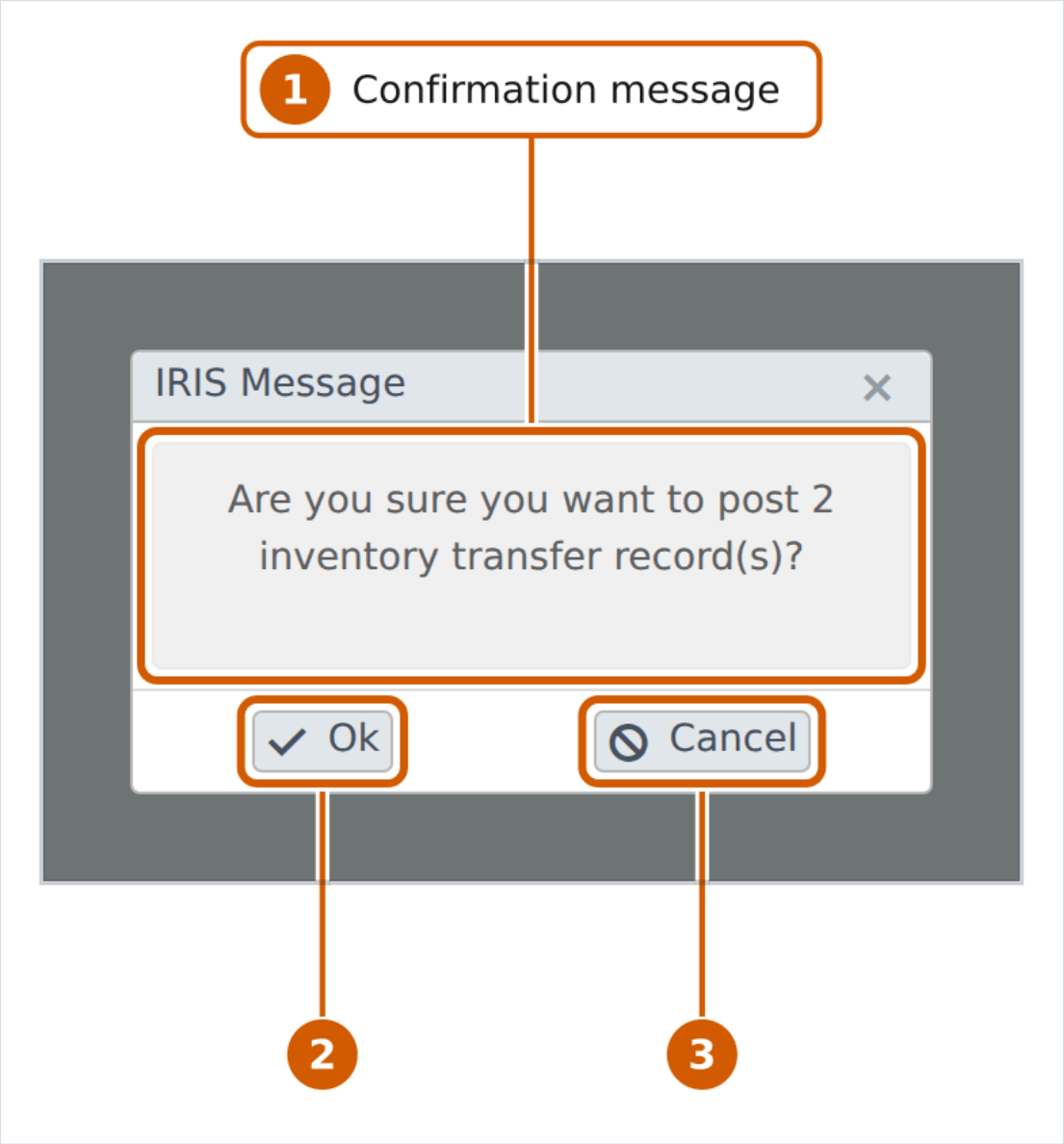
2. Filter the grid so that it shows only the transfers you want to post. See Grid filters.

   Posting includes every unposted transfer that matches the current filter.

3. Check that each transfer has a from location, a to location, a transfer date and a quantity that is not zero.
4. Check that each employee on the transfer has a rate for the transfer date.
5. Check that each piece of equipment on the transfer has a rate for the transfer date.
6. On the toolbar, click the button with the tooltip "Click to post inventory transfer records."

   An **IRIS Message** window asks "Are you sure you want to post N inventory transfer record(s)?" and shows **Ok** and **Cancel** buttons.

   > **Note:** This step requires security level 4 - Can Post on Inventory Transfer.



Clicking the post button asks you to confirm. The post includes every unposted transfer that matches the current filter.

1. Confirmation message
2. Ok posts the transfers
3. Cancel closes without posting

7. Click **Ok** to post the transfers. To close the window without posting, click **Cancel**.

   If the post succeeds, IRIS shows "All inventory transfer records posted to transaction successfully." If any transfer fails validation, IRIS shows the validation message, posts nothing and reloads the grid. If IRIS could not post some transfers, it reports that.
8. If IRIS reports that transfers could not be posted, check the quantities at both the from location and the to location before you post those transfers again.

   A transfer that fails stays unposted.
9. Check your notifications.

You find the **Inventory transfers posted** notification. If the post did not succeed, you find a notification titled **Inventory transfer post finished with errors**, **Inventory transfer post failed** or **Inventory transfer post result unknown**.

Post an inventory physical count

1. Open the **Inventory Physical Count** screen in Cost Accounting.

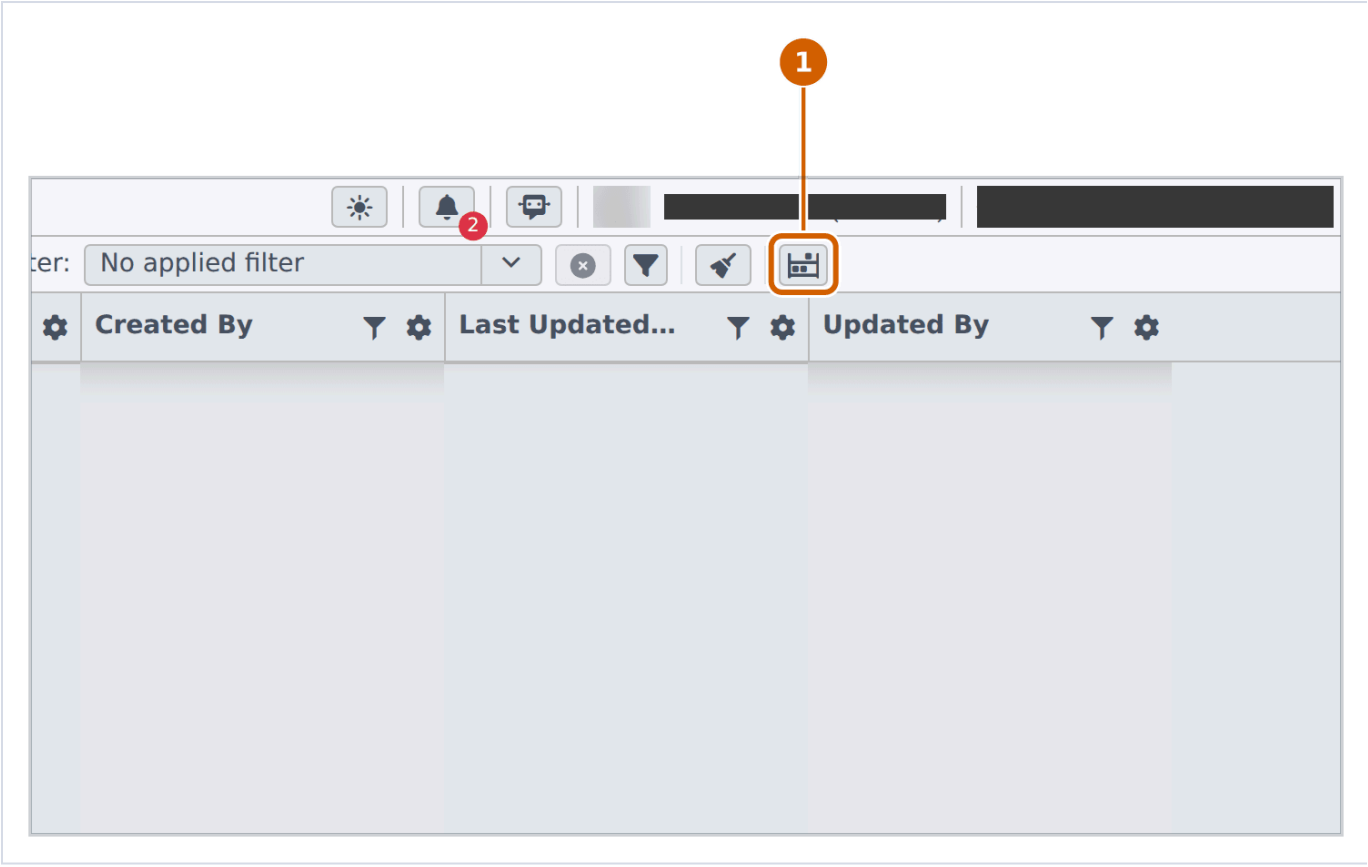
   The grid shows the count records with **Inventory Location**, **Quantity** and **Comment** columns.
2. Check that each count row has the counted **Quantity** and a **Comment**.

   Comment is required and holds up to 128 characters.
3. Filter the grid so that it shows only the count rows you want to post.

   Posting includes the records that match the current filter.
4. On the toolbar, click **Inventory Physical Count Posting**.

   IRIS shows a loading indicator while it collects the records. It then asks "Are you sure you want to update N record(s) in Inventory?" with **Ok** and **Cancel** buttons. The confirmation appears directly, so filter the grid before you click.

   > **Note:** This step requires security level 2 - Read/Write on Inventory Physical Count. You can also start this post from the main menu with **Options** > **Inventory Physical Count**.



The Inventory Physical Count screen. Inventory Physical Count Posting posts the counts that match the current filter.

1. Inventory Physical Count Posting

5. Click **Ok** to post the counts. To close the window without posting, click **Cancel**.

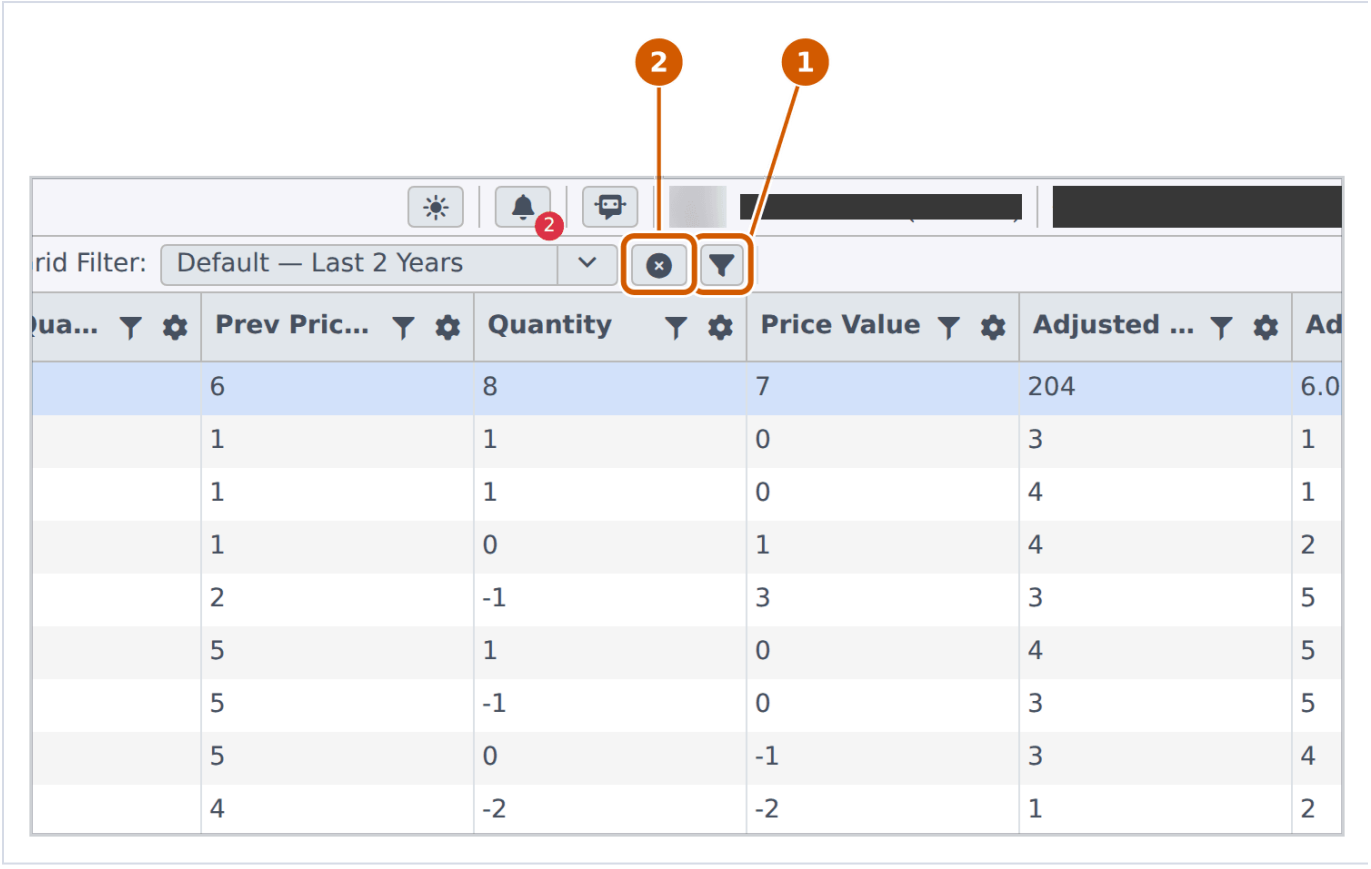
   If the post succeeds, IRIS shows "Inventory physical count posted successfully." and reloads the grid. Each counted location's quantity on hand now equals the counted quantity, and the grid removes the posted count rows.
6. Check your notifications.

   You find the **Inventory physical count posted** notification. If the post did not succeed, you find a notification titled **Inventory physical count post finished with errors**, **Inventory physical count post failed** or **Inventory physical count post result unknown**.

Review posted inventory activity

1. Open the **Inventory Transactions** screen in Cost Accounting.

   The screen shows a read-only grid of inventory transactions. The screen has no post button.



Inventory Transactions is a read-only history of inventory activity. Use Filter editor to find specific transactions.

1. Filter editor
2. Clear filter

2. To find specific transactions, click **Filter editor** on the toolbar. Filter by columns such as **Inventory Location**, **Transaction Type** or **Inv Date**.

   The grid shows only the matching transactions.

Reference

The three inventory posts at a glance

SCREEN	BUTTON	SECURITY LEVEL NEEDED	RECORDS INCLUDED	WHAT IT CHANGES
Inv Receive	Tooltip "Click to post Inventory Receiving records."	4 - Can Post	Receiving records that have not been posted yet. Review the grid before posting.	Receipts flagged to post to Accounts Payable create Accounts Payable payable records and leave the list. IRIS receives the other receipts into their inventory location and removes them from the list.

SCREEN	BUTTON	SECURITY LEVEL NEEDED	RECORDS INCLUDED	WHAT IT CHANGES
Inventory Transfer	Tooltip "Click to post inventory transfer records."	4 - Can Post	Every unposted transfer that matches the current filter	IRIS issues the quantity from the from location at its current unit price, receives it into the to location at an adjusted unit price, and marks the transfer posted.
Inventory Physical Count	**Inventory Physical Count Posting**	2 - Read/Write	Records that match the current filter	IRIS writes an adjustment transaction for each counted location, sets its quantity on hand to the counted quantity, and removes the posted count rows.

Confirmation and result messages

POST	CONFIRMATION	SUCCESS MESSAGE	FAILURE MESSAGES
Inventory receiving	Are you sure you want to post N inventory receiving record(s)?	Inventory receipts posted successfully.	Unable to post inventory due to a technical error. An email has been sent to support. IRIS also reports when records could not be posted.
Inventory transfer	Are you sure you want to post N inventory transfer record(s)?	All inventory transfer records posted to transaction successfully.	Unable to post inventory transfer due to a technical error. An email has been sent to support. / Unable to post inventory transfer due to a technical error. Please contact support. IRIS shows validation messages as a message. IRIS also reports when records could not be posted.
Inventory physical count	Are you sure you want to update N record(s) in Inventory?	Inventory physical count posted successfully.	Unable to post inventory physical count due to a technical error. An email has been sent to support. / Network error posting inventory physical count. An email has been sent to support. IRIS lists problems after `Posting Errors:` or `Voiding Errors:`, or shows the first validation error.

Inventory transfer validation messages

RULE	MESSAGE SHOWN WHEN THE RULE IS BROKEN
Each transfer needs a from location, a to location, a transfer date and a quantity that is not zero	The validation message lists the transfers that break the rule.
Each employee with a labor quantity needs a rate that covers the transfer date	Each employee must have a rate entered which covers the transfer date specified. The following employees are missing a rate: \<names\>
Each piece of equipment with a quantity needs a rate for the fiscal year of the transfer date	Each Equipment must have a rate for the fiscal year of the transfer date. The following Equipment is missing a rate: \ <names\>

RULE	MESSAGE SHOWN WHEN THE RULE IS BROKEN
IRIS reports all validation problems together	IRIS posts nothing until you fix every validation problem.

For fiscal years, see Units of measure, fiscal years and organizations.

How a transfer's unit price at the destination is calculated

PART	VALUE
Material cost	Quantity × unit price at the from location
Plus labor	Employee labor cost at the full-burden rate
Plus equipment	Equipment cost
Plus services	Service cost
New unit price	Total of the above ÷ quantity
Transaction comments	`Inventory Transfer To Location <name>` on the issue; `Inventory Transfer From Location <name>` on the receipt

What a physical count adjustment records

INVENTORY TRANSACTIONS COLUMN	VALUE WRITTEN
Transaction Type	`A` (adjustment)
Inv Date	The day you post the count
Prev Quantity / Prev Price Value	The location's quantity and price before the count
Quantity	Counted quantity minus previous quantity
Adjusted Quantity	Counted quantity
Total Cost Change	The difference × the location's existing price value
Comments	`Adjusted from inventory physical count screen -` followed by the count's **Comment**

Inventory Transactions grid columns

COLUMN
Inventory Location
Transaction Type
Inv Date
Vendor
Tracking Number
Prev Quantity

COLUMN
Prev Price Value
Quantity
Price Value
Adjusted Quantity
Adjusted Price Value
Total Cost Change
Labor Cost
Equipment Cost
Comments
Inv Transact Status
Created Date
Created By
Last Updated Date
Updated By

Inventory posting notifications

NOTIFICATION FEATURE (CATEGORY CAS)	TITLE ON SUCCESS	OTHER TITLES
Post Inventory Receiving	Inventory receipts posted	Inventory receiving post finished with errors / Inventory receiving post failed / Inventory receiving post result unknown
Post Inventory Transfers	Inventory transfers posted	Inventory transfer post finished with errors / Inventory transfer post failed / Inventory transfer post result unknown
Post Inventory Physical Count	Inventory physical count posted	Inventory physical count post finished with errors / Inventory physical count post failed / Inventory physical count post result unknown

Tips and notes

> **Important:** If a transfer could not be posted, it stays unposted. Check the quantities at both the from location and the to location before you post it again.

> **Note:** Receipts flagged to post to Accounts Payable create Accounts Payable payable records and leave the **Inv Receive** list. The tracking number becomes the invoice number, the receive date becomes the invoice date and due date, and the price value becomes the unit cost.

> **Note:** Transfer posting checks every transfer first. If any transfer fails validation, IRIS reports all the problems together and posts nothing. Fix the problems and post again.

> **Note:** Posting a physical count replaces each location's quantity on hand with the counted quantity and removes the posted count rows. Double-check the counts before you click **Ok**.

> **Tip:** Inventory Transactions is read-only. Use it to review posted activity, for example adjustments from physical counts (Transaction Type `A`).

Related topics

- Grid filters
- Notifications
- Security Administration: access levels by user
- Transactions: void, reinstate and export
- Cost Accounting screen tools
- Data grid overview and basics
- Units of measure, fiscal years and organizations

Posting accrued time

Overview

Use **Post accrued time** on the Time Accrual screen to post the accrued time that the grid shows as timecards for a task date you choose. Use a task date in the month the time accrued in.

If employees would exceed the maximum balance for an accrued pay type, IRIS10 opens the **Confirm Time Accrual Posting** window so you can review them before the post continues. After the post, a message and a notification report the result.

Before you begin

- You are signed in to IRIS10.
- Your access level for the Time Accrual screen lets you post. See Security Administration: access levels by user.
- Time accrual records exist on the Time Accrual screen in the Cost Accounting portal.

Posting uses the records the grid currently shows, and only active records are posted. To filter the grid, see Grid filters.

Procedure

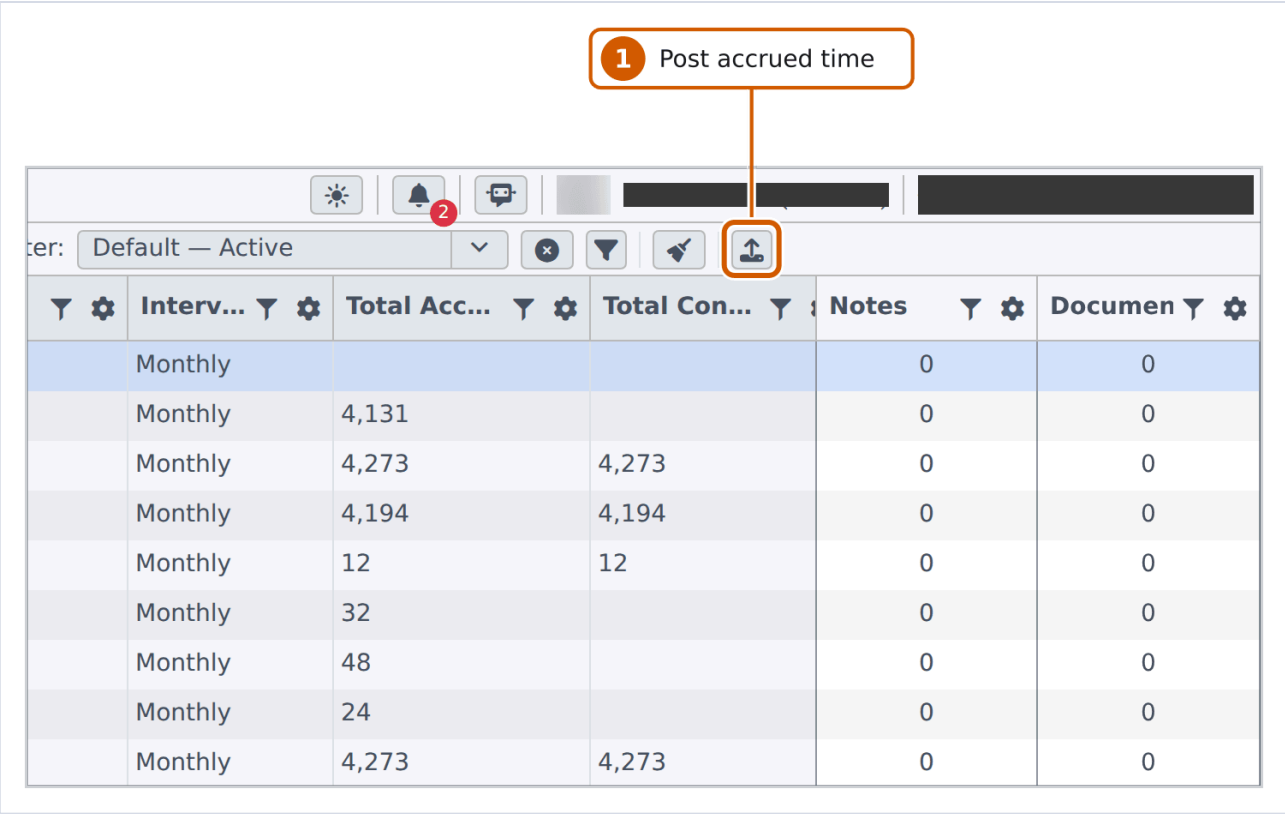
Post accrued time

1. Open the Time Accrual screen in the Cost Accounting portal. The Time Accrual grid opens, sorted by most recently updated first.

   > **Note:** The screen must be enabled for your user in security administration.

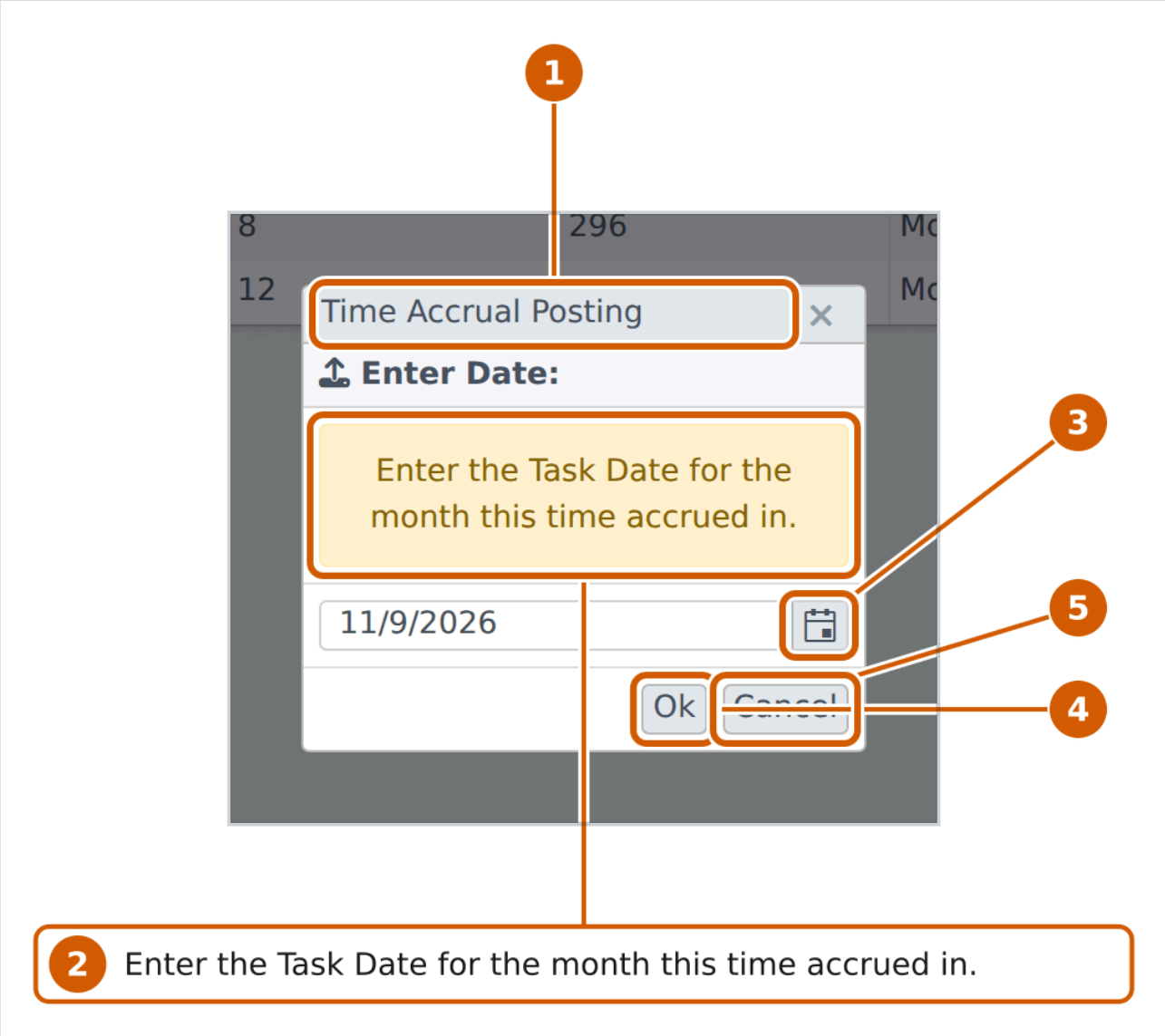
2. Use the grid filters so the grid shows only the accrual records you want to post. See Grid filters. Only the records the grid currently shows are included in the post. Of these, only active records are posted.
3. On the grid toolbar, click **Post accrued time**. The **Time Accrual Posting** window opens with the warning "Enter the Task Date for the month this time accrued in." If the grid has no records, the message "There are currently no time accrual records available for posting." appears instead and no window opens.

   > **Note:** Posting requires access level 4 on the Time Accrual screen.



The Time Accrual screen. Post accrued time on the toolbar starts posting for the records the grid shows.

1. **Post accrued time** – Posts the records currently shown by the grid filters.



The Time Accrual Posting window. Enter the task date for the month the time accrued in, then click Ok.

1. **Time Accrual Posting**
2. **Enter the Task Date for the month this time accrued in.**
3. **Select date** – Defaults to today's date.
4. **Ok**
5. **Cancel** – Closes the window without posting.

4. In the date box, enter the task date. Use a date in the month the time accrued in. The date box is required and defaults to today's date.

> **Note:** To pick the date instead, click **Select date**.

5. Click **Ok**. IRIS10 checks the records without changing any data.
   - If the date is missing or invalid, "Please enter a valid task date for posting." appears and posting stops.
   - If no employee would exceed a maximum balance, a message asks "Are you sure you want to post the time accrual for the task date: <date>".

- If some employees would exceed a maximum balance, the **Confirm Time Accrual Posting** window opens. Continue with Respond to the Confirm Time Accrual Posting window.

6. In the "Are you sure" message, confirm to post. The windows close and "Time accrual posted." appears.

> **Note:** If you cancel in the "Are you sure" message instead, the posting window closes and nothing is posted.

Respond to the Confirm Time Accrual Posting window

1. Read the warning and the list of employees in the **Confirm Time Accrual Posting** window. The window lists each record where Current Balance plus Accrued Hours would exceed Max Hours, sorted by Full Name. The list is read-only.
2. Optional: click the Excel export button on the list toolbar. See Data grid overview and basics. The list is saved as an Excel file named `MaxBalanceEmployees.xlsx`.
3. Click **Yes** to continue the post. The post continues and includes the listed employees.

> **Note:** Clicking **No** also continues the post. Clicking **Cancel** closes both windows and nothing is posted.

4. Wait for the result message. On success, the windows close and "Time accrual posted." appears. If the post is rejected, the windows close and the reasons are listed in a message.

Reference

Confirm Time Accrual Posting columns

COLUMN	MEANING
Full Name	Employee who would exceed the maximum balance.
Pay Type	Accrued pay type of the record.
Max Hours	Maximum hours set on the accrual record.
Current Balance	Employee's current balance for the pay type.
Accrued Hours	Hours this post would add.
New Balance	Current Balance plus Accrued Hours.

What each posted record creates

TIMECARD FIELD	VALUE
Task date	The task date entered in the **Time Accrual Posting** window.
Activity, employee, pay type	Copied from the accrual record.

TIMECARD FIELD	VALUE
Hours	The accrual record's Hours.
Comment	The accrual record's Comments; if it has none, `Posted from Time Accrual screen`.
Created / updated by	The user who ran the post.

Messages

MESSAGE	WHEN IT APPEARS	WHAT TO DO
There are currently no time accrual records available for posting.	The grid, or its current filter, shows no records.	Change or clear the grid filters and try again.
Please enter a valid task date for posting.	**Ok** was clicked with a missing or invalid task date.	Enter a valid date and click **Ok** again.
Are you sure you want to post the time accrual for the task date: <date>	No employee would exceed a maximum balance.	Confirm to post or cancel to stop.
Time accrual posted.	The post finished successfully.	None. Check your notifications.
You can not affect a tenant you are not logged into	The records belong to an organization you are not signed in to.	Sign in to the correct organization and try again.
Unable to validate time accrual due to a technical error. An email has been sent to support.	A technical error happened while checking the records.	Try again later or contact support.
Unable to post time accrual due to a technical error. An email has been sent to support.	A technical error happened while posting.	Try again later or contact support.

Post notification text

See Notifications for where the notification appears.

OUTCOME	NOTIFICATION TEXT
Success	Accrued time post finished with no errors.
Post failed	Accrued time post did not finish. Try again or contact support.

Tips and notes

> **Important:** Posting uses every record the grid currently shows, not only selected rows. Filter the grid before you click **Post accrued time**.

> **Note:** Inactive accrual records are not posted even if the grid shows them.

> **Tip:** The task date defaults to today. Change it to a date in the month the time accrued in before clicking **Ok**.

> **Tip:** Export the **Confirm Time Accrual Posting** list to Excel before you choose, so you have a record of who was over the maximum balance.

> **Note:** In **Confirm Time Accrual Posting**, only **Cancel** stops the post; **Yes** and **No** both continue it.

> **Note:** If the post is rejected, no notification is sent; the reasons appear only in the on-screen message.

Related topics

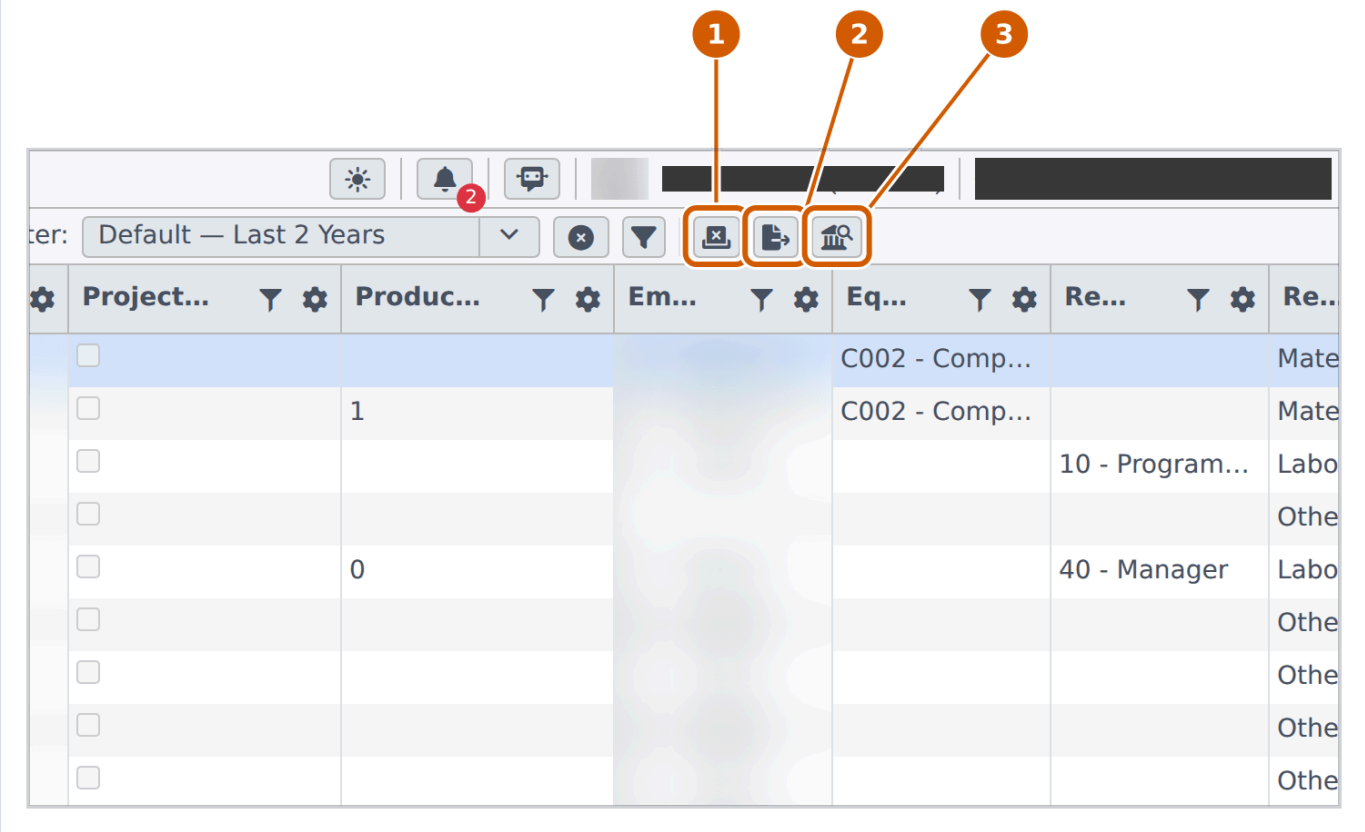
- Posting timecards
- Notifications
- Grid filters
- Security Administration: access levels by user
- Cost Accounting screen tools
- Data grid overview and basics

Transactions: void, reinstate and export

Overview

The Transact screen in the Cost Accounting module lists transaction records, sorted by Task Date with the newest first. This page covers three toolbar buttons on the screen:

- **Void transaction record(s)** opens a prompt to void or reinstate the selected records.
- **Export CAS Data** exports billable records to ARS Invoice Entry.
- **Audit history** opens the Audit History window.



The Transact screen, with the Void transaction record(s), Export CAS Data and Audit history toolbar buttons.

1. Void transaction record(s)
2. Export CAS Data
3. Audit history

Before you begin

- Sign in to IRIS10.
- Make sure you have access to the Transact screen in the Cost Accounting module.

- Make sure you have access level 4 on the Transact screen to void, reinstate and export. See Security Administration: access levels by user.
- Know how to use the shared data grid and grid filters. See Data grid overview and basics and Grid filters.

> **Important:** The void prompt has no cancel button. Both **Reinstate** and **Void** change the selected records. Check your selection before you click **Void transaction record(s)**.

Procedure

Void transaction records

1. Open the Transact screen in the Cost Accounting module. The Transact grid opens and lists transaction records sorted by Task Date, newest first.
2. Select the row or rows you want to void. You can select more than one row. Your selected rows are highlighted. Check that you selected only the records you want to void, because the next prompt has no cancel button.
3. On the toolbar, click **Void transaction record(s)**. A prompt asks "Do you want to reinstate these records?" and shows two buttons, **Reinstate** and **Void**. If you selected no rows, the message "You must first select records to void." appears instead.

   > **Note:** This step requires access level 4 on the Transact screen. If you can't use the button, ask your administrator. You can also choose **Options** > **Void Transact Records** from the main menu, which does the same thing.

4. Click **Void**. The message "Voiding Complete on N records" appears and the grid refreshes. IRIS10 removes the voided records from the Transact screen and records each one in audit history.

Reinstate transaction records to the Time Card

1. Open the Transact screen in the Cost Accounting module. The Transact grid opens.
2. Select the row or rows you want to reinstate. Your selected rows are highlighted. Check your selection, because the next prompt has no cancel button.
3. On the toolbar, click **Void transaction record(s)**. A prompt asks "Do you want to reinstate these records?" with the buttons **Reinstate** and **Void**.

   > **Note:** This step requires access level 4 on the Transact screen. You can also choose **Options** > **Void Transact Records**.

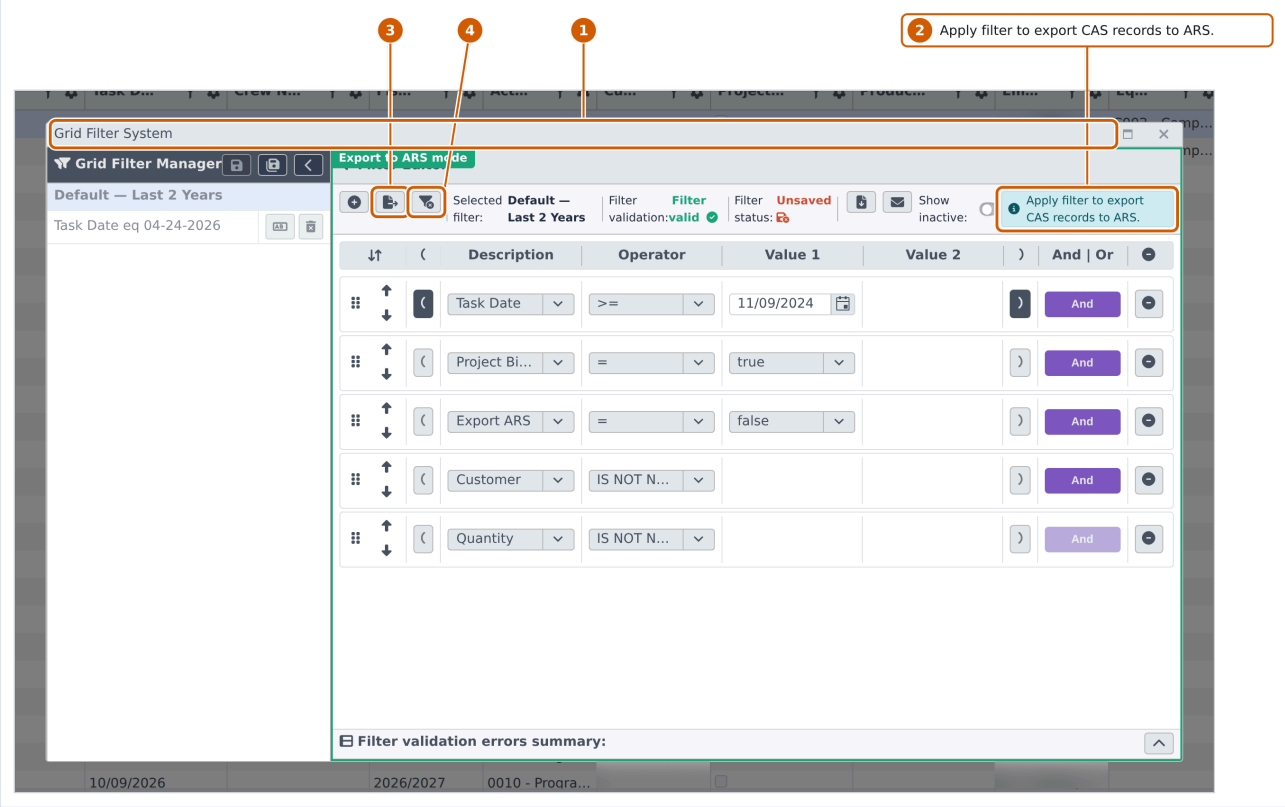
4. Click **Reinstate**. The message "Voiding Complete, N records are reinstated" appears and the grid refreshes. IRIS10 removes the records from the Transact screen and adds them back to the Time Card screen as new, unposted records created by you. IRIS10 records each one in audit history.

5. Open the Time Card screen to correct the reinstated records. The Time Card screen lists the reinstated records as unposted. See Posting timecards.

Export transaction records to ARS Invoice Entry

1. On the Transact screen, set a grid filter to narrow the records you want to export, such as a date range or customer. This step is optional. Your filter rows are kept when you start the export.
2. On the toolbar, click **Export CAS Data**. The Grid Filter System window opens with the message "Apply filter to export CAS records to ARS." IRIS10 adds the export rules to your filter: Project Billable is true, Customer is not empty, Quantity is not empty and Export ARS is false. IRIS10 keeps your other filter rows in parentheses. IRIS10 removes any of your rows for Project Billable or Export ARS, and any rows looking for an empty Customer or Quantity.

> **Note:** This step requires access level 4 on the Transact screen.



After you click Export CAS Data, the Grid Filter System window opens in export mode with the export rules added to your filter.

1. Grid Filter System
2. Apply filter to export CAS records to ARS.
3. Apply: applies the filter and continues to the export confirmation
4. Clear the current filter

3. Review the filter rows. The filter shows the records you want to export.

4. Change your own filter rows if needed. The filter shows the records you want to export.
5. Click the **Apply** button (tooltip "Click to apply filter and export CAS records to ARS."). IRIS10 asks "Are you sure you want to continue to export N records to the ARS Invoice Entry?" with **Yes** and **No**. If no records qualify, a warning explains the export rules instead and IRIS10 keeps your filter so you can change it.
6. Click **Yes** to export. IRIS10 shows "Successfully exported N record(s) to ARS Invoice Entry." and refreshes the grid. IRIS10 marks the exported records as exported to ARS and records each change in audit history.

   > **Note:** To cancel instead, click **No** at the confirmation. IRIS10 clears the filter and cancels the export. IRIS10 exports nothing.

7. If a window titled "Previoulsy Exported to ARS" opens, review the records it lists. The window lists the records that could not be exported. For each one it shows the task date, a reference such as "Employee: " or "Equipment: ", the activity and the reason. IRIS10 still exports the other eligible records in the same export, and the grid refreshes if IRIS10 exported any.

Review audit history

1. On the Transact toolbar, click **Audit history** (tooltip "Click to view the audit history for this screen."). The Audit History window opens. You can maximize it or close it.
2. Select a row in the audit history grid. The newest changes are listed first. While the change loads, the detail panel reads "Loading the change...", then it shows the change. Before you select a row, the panel reads "Select a row to see the change."
3. Use the toggle to switch between only the changed or filled fields and all fields. The footer reports counts such as "N changed fields. M unchanged fields hidden."
4. Click fields to select them. This step is optional. The copy button reads "Copy all", "Copy field" or "Copy N fields", depending on your selection.
5. Open the **Copy** menu and choose JSON, CSV or Text. The button shows "Copied" or "Copy failed".

Reference

Toolbar buttons covered on this page

BUTTON	TOOLTIP	WHAT IT DOES	ACCESS NEEDED
Void transaction record(s)	Click to void transaction record(s).	Opens the void/reinstate prompt for the selected records. Also available as **Options** > **Void Transact Records**.	Level 4 on Transact
Export CAS Data	Click to Export to ARS Invoice Entry	Adds the export rules to your filter and opens the Grid Filter System window in export mode.	Level 4 on Transact

BUTTON	TOOLTIP	WHAT IT DOES	ACCESS NEEDED
Audit history	Click to view the audit history for this screen.	Opens the Audit History window.	Not stated

Void prompt buttons

BUTTON	RESULT	MESSAGE
Reinstate	IRIS10 removes the selected records from Transact and adds them back to the Time Card screen as new, unposted records. Material records reverse inventory.	Voiding Complete, N records are reinstated
Void	IRIS10 removes the selected records from Transact. Material records reverse inventory.	Voiding Complete on N records
(none)	There is no cancel button. Check your selection before you open the prompt.	—

Export rules and reasons a record is not exported

RULE	FILTER ROW ADDED BY EXPORT CAS DATA	REASON SHOWN IF A RECORD FAILS
The project must be billable	Project Billable = true	Project must be billable
The record must have a customer	Customer is not null	Customer must be specified
The record must have a quantity	Quantity is not null	Quantity can not be null
The record must not already be exported	Export ARS = false	Record has already been exported to ARS

What an exported record becomes in ARS Invoice Entry

ARS INVOICE ENTRY VALUE	TAKEN FROM
Date of service	The transaction's Task Date
Bill rate	The transaction's Bill Rate
Description	The transaction's Description, or "Missing Description" if it has none

Messages when voiding or reinstating

MESSAGE	MEANING / WHAT TO DO
You must first select records to void.	Select one or more rows, then try again.
Voiding Complete on N records	The void succeeded; the grid refreshes.
Voiding Complete, N records are reinstated	The reinstatement succeeded; check the Time Card screen.
Your session has expired. Refresh the page and sign in again before voiding records.	Refresh the page, sign in again and repeat.

MESSAGE	MEANING / WHAT TO DO
No records were supplied to void.	No records reached IRIS10; select rows and try again.
You can not affect a tenant you are not logged into	IRIS10 voided nothing. Contact your administrator.
Not authorized to affect system data.	IRIS10 voided nothing. Contact your administrator.

Messages when exporting

MESSAGE	MEANING / WHAT TO DO
Are you sure you want to continue to export N records to the ARS Invoice Entry?	Click **Yes** to export or **No** to clear the filter and cancel.
A record can be exported only when its project is billable, it has a customer, it has a quantity, and it is not already exported to ARS.	No records match. IRIS10 keeps your filter; change it and apply again.
Successfully exported N record(s) to ARS Invoice Entry.	The export succeeded; the grid refreshes.
No records were exported to ARS Invoice Entry. The selected records were already exported or no longer meet the export rules.	IRIS10 exported nothing. Review the records against the export rules.
Previoulsy Exported to ARS (window)	Lists records that could not be exported with the reason; IRIS10 exported the other eligible records.
No records were sent to export.	No records reached IRIS10; adjust the filter and try again.
Session expired. Please refresh the page and try again.	Refresh the page and repeat the export.
Technical error with a short reference code	Some or all records may have been exported. Check the Export ARS column before exporting again, and quote the reference code to support.

Audit History detail headings

ACTION	VALUE COLUMN HEADING(S)
Update	Field, Display, Before, After
Insert	Value when inserted
Delete	Value when deleted
Void	Value when voided
Reinstate	Value when reinstated

Tips and notes

Important: The void prompt has no cancel button. Both **Reinstate** and **Void** change the selected records. Check your selection before you click **Void transaction record(s)**.

Note: The void prompt asks "Do you want to reinstate these records?" Click **Reinstate** to send the records back to the Time Card screen, or **Void** to remove them.

Note: When you void or reinstate a Material record, IRIS10 reverses the inventory. It credits the quantity back to the inventory location and writes a reversing inventory transaction. Its comment reads "Delete Inventory Record From Transact" (void) or "Reinstated Timecard Record" (reinstate). See Posting inventory.

Tip: Export CAS Data keeps your own filter rows, so filter first (for example by date range or customer) to export only the records you mean to.

Important: Clicking **No** at the export confirmation clears the whole filter, including your own rows.

Important: If an export ends with a technical error, don't export again right away. Some or all records may have been exported, so check the Export ARS column first.

Note: You can't export a record that you already exported. The "Previoulsy Exported to ARS" window lists it, and IRIS10 still exports the other eligible records.

Tip: If you can't use **Void transaction record(s)** or **Export CAS Data**, ask your administrator to check your access level on the Transact screen.

Related topics

- Grid filters
- Posting timecards
- Posting inventory
- Data grid overview and basics
- Cost Accounting screen tools
- Security Administration: access levels by user

Cost Accounting screen tools

Overview

Some Cost Accounting screens have extra toolbar buttons and tools. This page describes them:

- **Clone project** on the Project screen creates a new project from an existing one, with its bill rates and active sub-projects.
- **Copy Employee Rates** on the Employee Rate screen creates a new rate record for each employee you select, from that employee's latest rate record.
- The Update Rates screen has seven tabs. They copy class and equipment rates, calculate labor class rates, and update rates on posted transactions.
- Lookup values buttons on the Inventory, RBF and Activity screens open the lookup values for those screens.
- The Pay Variance screen shows pay variance records and their detail.

This page is for cost accounting and payroll staff, supervisors and administrators.

Before you begin

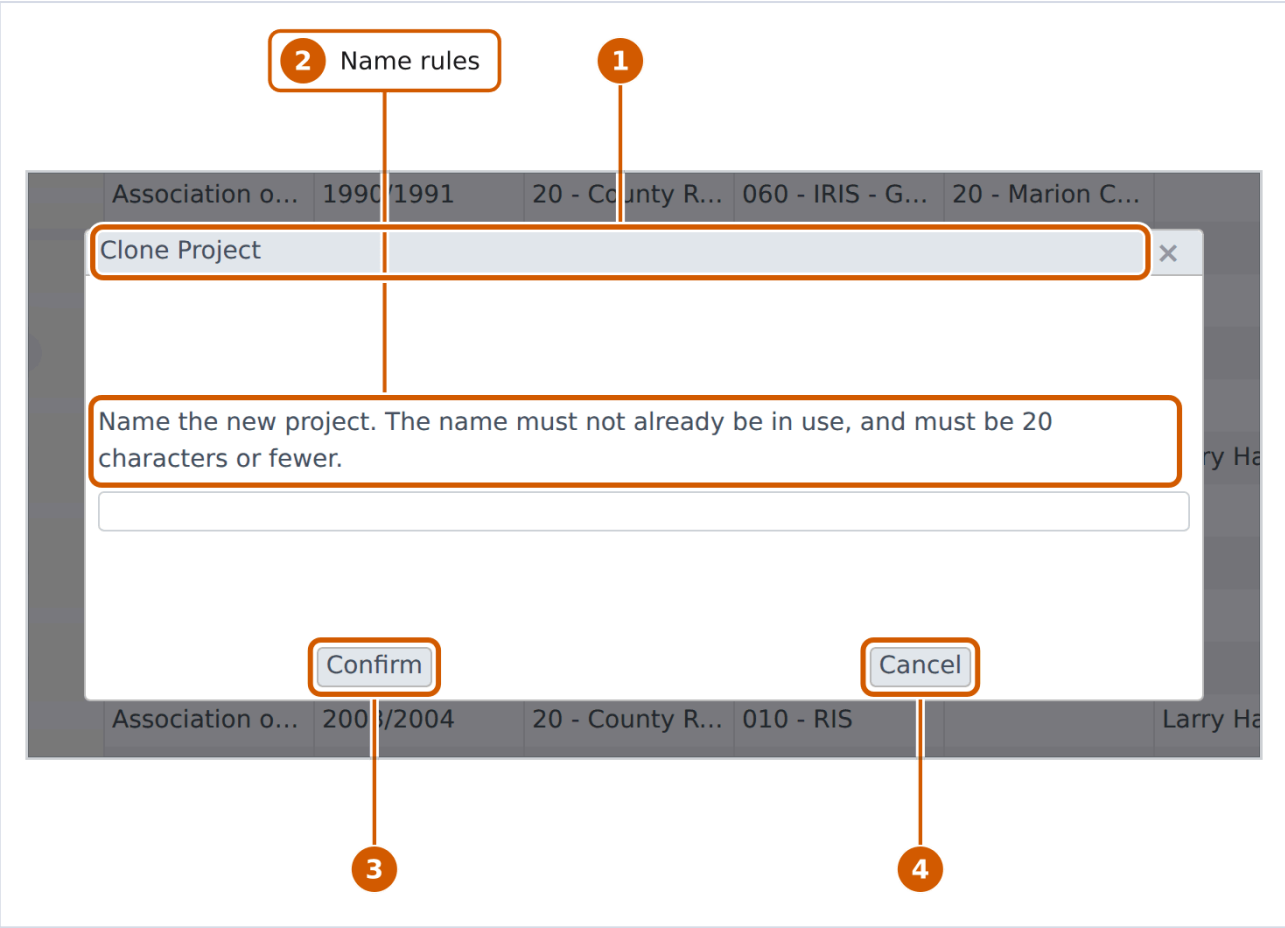
- Sign in to IRIS10 with the Cost Accounting portal selected.
- Know how to select rows and filter in the shared data grid. See Grid viewing and editing.
- To clone projects or copy employee rates, you need level 4 access to the Project and Employee Rate screens. See Security Administration: access levels by user.
- Have only qualified staff update rates, and back up your database first.
- The copy and calculate tools use fiscal years. See Units of measure, fiscal years and organizations.

Procedure

Clone a project

1. Open the Project screen in the Cost Accounting portal.
2. In the Project grid, click the row of the project you want to clone. The row is selected. If you skip this step, **Clone project** shows "Please select a project to clone."
3. On the toolbar, click **Clone project**. The Clone Project window opens, with a name box and the **Confirm** and **Cancel** buttons.

> **Note: Clone project** requires level 4 access to the Project screen.



The Clone Project window. Type a new name of 20 characters or fewer, then click Confirm.

1. Clone Project window
2. Name rules
3. Confirm (clones immediately)
4. Cancel

4. Type a name for the new project. It must not already be in use and must be 20 characters or fewer. The name is checked when you confirm. Upper and lower case are ignored, so a name that differs from an existing name only in case is rejected.
5. Click **Confirm**. The clone runs immediately and IRIS10 does not ask you to confirm again. The Project grid reloads, the new project's row is selected, and the message Project cloned as "<name>". appears. If the name is blank, "Enter a name for the new project." appears and nothing is created.

Copy employee rates forward

1. Open the Employee Rate screen in the Cost Accounting portal.
2. On the toolbar, click **Copy Employee Rates**. You can also use **Copy Employee Rates** on the **Options** menu. The Copy Employee Rates window opens. It shows a grid with the **Copy** and **Employee** columns. If no employees are listed, the grid shows "No employee records available."

> **Note: Copy Employee Rates** requires level 4 access to the Employee Rate screen.



The Copy Employee Rates window. Select the Copy checkbox for each employee, then click Ok.

1. Copy Employee Rates window
2. Select all
3. Select none
4. Ok (copies immediately)
5. Cancel

3. Select the **Copy** checkbox for each employee whose rates you want to copy. The **Copy** checkboxes start cleared.

> **Note:** To change every row at once, click **Select all** or **Select none**. **Select all** selects every checkbox and **Select none** clears every checkbox.

4. Click **Ok**. The copy runs immediately and IRIS10 does not ask you to confirm again. If the copy succeeds, the window closes, a message reports how many employee rates were copied, and the Employee Rate grid reloads. If the copy is rejected, the window closes and the reasons are shown.
5. To leave without copying, click **Cancel** and answer the question "Are you sure you want to cancel updating employee rates?" The window closes only if you confirm.

Open the Update Rates screen and choose a tool

1. Open the Update Rates screen in the Cost Accounting portal. A welcome box asks you to click one of the tabs above it.
2. Click the tab for the task you need: **Copy Class Rates**, **Copy Equipment Rates**, **Calculate Labor Class Rates**, **Employee Rates**, **Equipment Rates**, **Class Rates** or **Inventory Rates**. The panel for that tab opens and shows the red warning about qualified personnel and backing up your database.

Copy class rates to another fiscal year

1. On the Update Rates screen, click the **Copy Class Rates** tab.
2. Choose a **Resource type**: Labor, Equipment, Material or Services. Labor is selected by default. Choosing a type reloads the list of resource items for that type.
3. Select one or more items in the list. While no item is selected, a red message reads "Please select items before attempting to update rates."

> **Note:** Use the **Select all** checkbox to select every item, or **Clear selection** to start again.

4. In the **From** and **To** dropdowns, choose the fiscal years to copy from and to. You can type in a dropdown to filter it.
5. Under **Rate**, keep **Current rate**, or choose **By percent** and enter a percentage. The percentage can have up to 4 decimal places. The percent box can be used only when **By percent** is chosen. Otherwise it is disabled and cleared.
6. Click **Update**. The copy runs immediately and IRIS10 does not ask you to confirm again. A message reports how many class rates were copied and between which fiscal years. If no item is selected or a required field is empty, a message explains what is missing and nothing is copied.

Calculate labor class rates

1. On the Update Rates screen, click the **Calculate Labor Class Rates** tab.
2. Select one or more labor classes in the list.

> **Note:** Use **Select all** to select every class, or **Clear selection** to start again.

3. Enter the **Date** and choose the **Fiscal year**.

4. Click **Update**. The calculation runs immediately and IRIS10 does not ask you to confirm again. "Labor class rates calculated successfully. N records affected." appears. If nothing is selected, "Please select items before attempting to calculate labor class rates." appears.

Update employee rates on posted labor transactions

1. On the Update Rates screen, click the **Employee Rates** tab.
2. Choose what to update by: **Employee**, **OH Class** or **Labor Class**. **Employee** is selected by default.

   > **Note:** To include every employee, select **Update All Employees** instead.

3. To refresh the premium amount and premium percentage, select **Update Premium**.
4. To recalculate the pay factor from the pay type, select **Update Pay Type**. Values whose option is not selected stay as they are on the transactions.
5. Choose the **Begin Date** and **End Date**.
6. Click **Update**. The update runs immediately and IRIS10 does not ask you to confirm again. "Employee rates updated successfully. N records affected." appears. If a required field is empty, "Please complete the required fields before updating employee rates." appears.

Update class, equipment or inventory rates on posted transactions

1. On the Update Rates screen, click the **Class Rates**, **Equipment Rates** or **Inventory Rates** tab.
2. For the **Class Rates** or **Equipment Rates** tab, choose the record to update:

TAB	WHAT TO CHOOSE
Class Rates	Choose the class to update, or select **Update All Labor Classes**.
Equipment Rates	Choose **Equipment** or **Equipment Class** and pick the record, or select **Update All Equipment**.

3. On the **Inventory Rates** tab, choose the **Update Inventory Item**.
4. On the **Inventory Rates** tab, choose **Resource Rate** or **Class Rate**. **Resource Rate** is selected by default. **Current Rate** is read-only and shows the rate in use for the option you chose.
5. On the **Inventory Rates** tab, enter the **New Rate**.
6. Choose a begin date and an end date. The end date cannot be before the begin date.
7. Click **Update**. The update runs immediately and IRIS10 does not ask you to confirm again. A message such as "Class rates updated successfully. N records affected." appears. If a required field is empty, a "Please complete the required fields before updating ... rates." message appears.

The rate updates change the posted transactions described in Transactions: void, reinstate and export.

Reference

What Clone project copies

ITEM	RESULT ON THE NEW PROJECT
Header details such as description, dates, road, billing settings, estimated costs, user fields 1-10 and comments	Copied from the source project
Status	Active and not complete, with no completion date
Total project cost	Left empty
Resource item bill rates (resource class and rate)	Copied
Sub-projects	Only active sub-projects are copied, and they are set to active. Archived sub-projects are not copied.

Copy Employee Rates: what each new rate record contains

ITEM	VALUE
Source record	The employee's rate record with the latest end date. Records without a begin date or end date are ignored.
Records created	One new record per selected employee
Begin date	The day after the source record's end date
End date	One year after the source record's end date
Rates carried forward	Rate, fringe rate, overhead rate, other rate, full burden rate, OH cost and OH calc method
Pay change type	Left blank

Update Rates tabs

TAB	WHAT IT DOES	MAIN FIELDS
Copy Class Rates	Copies class rates from one fiscal year to another	Resource type (Labor, Equipment, Material, Services), resource items, From, To, Rate (Current rate or By percent)
Copy Equipment Rates	Copies equipment rates from one fiscal year to another	Equipment or Equipment Class, From and To fiscal years, Rate (Current Rate, By Percent or By Amount). By Amount uses Rate = (Current Rate + Amount).
Calculate Labor Class Rates	Calculates rates for the selected labor classes	Labor classes, Date, Fiscal year
Employee Rates	Refreshes rates on labor transactions from the employee rate record that covers each task date	Employee, OH Class or Labor Class; Update All Employees, Update Premium, Update Pay Type; Begin Date, End Date

TAB	WHAT IT DOES	MAIN FIELDS
Equipment Rates	Updates rates on equipment transactions	Equipment or Equipment Class; Update All Equipment
Class Rates	Replaces the class rate on posted transactions with the resource class rate for the transaction's fiscal year	Class; Update All Labor Classes
Inventory Rates	Writes a new resource rate or class rate on inventory transactions in the date range	Update Inventory Item, Resource Rate or Class Rate, Current Rate, New Rate, Begin Date, End Date

Update Rates terms

TERM	MEANING
Labor class	A resource class of the Labor type. These classes are listed on the **Calculate Labor Class Rates** tab.
By percent	**Copy Class Rates** option that changes rates by the percentage you enter, instead of copying the current rate.
By Amount	**Copy Equipment Rates** option that sets Rate = (Current Rate + Amount).
OH Class	An **Employee Rates** option that updates transactions for an overhead class.
Update Pay Type	An **Employee Rates** checkbox. When it is selected, the pay factor on transactions is recalculated from the pay type.
Update Premium	An **Employee Rates** checkbox. When it is selected, the premium amount and premium percentage on transactions are refreshed with the current values.

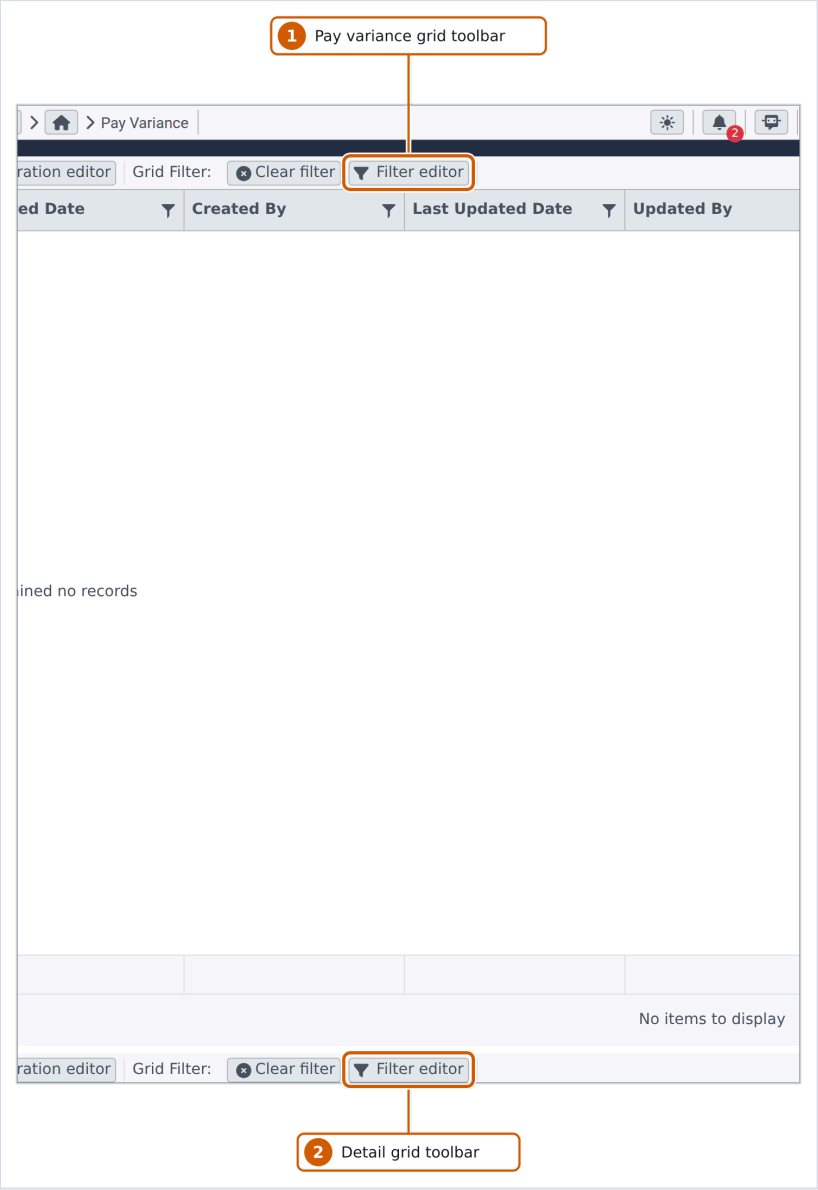
Lookup values buttons

These buttons open the lookup values for the Inventory, RBF and Activity screens. For the lookup tables, see Lookup values.

SCREEN	BUTTON	TOOLTIP
Inventory	**Inventory lookup values**	Open the inventory lookup values dialog.
RBF	**RBF lookup values**	Open the road/bridge/facility lookup values dialog.
Activity	**Actvity lookup values** (spelled this way on screen)	Open the activity lookup values dialog.

Pay Variance grids

The Pay Variance screen has an upper grid and a lower grid, each with its own toolbar. For the Filter editor, see Grid filters.



The Pay Variance screen. Select a row in the upper grid to see its detail in the lower grid.

1. Pay variance grid toolbar
2. Detail grid toolbar

GRID	COLUMNS
Pay variance (upper grid)	Fiscal Key, Month Index, Task Date, Quantity, Created Date, Created By, Last Updated Date, Updated By
Pay variance data (lower grid)	Fiscal Key, Month Index, Employee Key, Extra Help, Supervisor, Variance Pay, Pay Type Key, Task Date, Quantity, Pay Rate, Pay Factor, Created Date, Created By, Last Updated Date, Updated By

Messages

TOOL	MESSAGE	MEANING
Clone project	Please select a project to clone.	Select a row in the Project grid first.
Clone project	Enter a name for the new project.	The name box is empty.
Clone project	name <name> already exists.	Another project already has that name, ignoring upper and lower case.
Clone project	name parameter must not exceed 20 characters.	Shorten the name.
Clone project	Source project not found for this tenant.	The selected project could not be found.
Clone project	Project cloned as "<name>".	The clone succeeded.
Clone project	An error occurred while cloning the project. An email has been sent to support.	A technical error occurred. Support has been notified.
Copy Employee Rates	No employee rate records where found with that criteria to copy forward	None of the selected employees has a rate record with both a begin date and an end date.
Copy Employee Rates	Unable to copy employee rates due to a technical error. An email has been sent to support.	A technical error occurred. Support has been notified.
Copy Class Rates	Please select at least one item before copying class rates.	Select at least one resource item.
Copy Class Rates	Please complete the required fields before copying class rates.	Fill in the required fields.
Copy Class Rates	N class rates copied from: <from year> to: <to year>, successfully.	The copy succeeded.
Calculate Labor Class Rates	Labor class rates calculated successfully. N records affected.	The calculation succeeded.
Employee, Equipment, Class, Inventory Rates	<Type> rates updated successfully. N records affected.	The update succeeded.
Employee, Class, Equipment, Inventory Rates	Please complete the required fields before updating <type> rates.	Fill in the required fields.
Any rate tool	You can not affect a tenant you are not logged into / Not authorized to affect system data.	You can change only data that belongs to your own organization.

Tips and notes

Important: Each panel on the Update Rates screen shows this warning: updating rates should be done only by qualified personnel, and you should back up your database before updating any rates. The **Update** button runs as soon as the fields are valid and does not ask you to confirm.

Important: Clone Project Confirm and **Copy Employee Rates Ok** act immediately, and IRIS10 does not ask you to confirm again. Check the name or the selected employees before you click.

Note: Employee Rates updates skip labor transactions that have an overridden labor rate, and transactions whose pay type does not have Allocate set. **Class Rates** updates for labor also change only transactions whose pay type has Allocate set.

Note: Every rate update is recorded in the update rates log. Each changed transaction also gets an audit history entry that holds its values before and after the change.

Tip: On the Pay Variance screen, select a row in the upper grid to load that record's detail into the lower grid.

Tip: Inventory lookup values is also available from the main menu.

Related topics

- Lookup values
- Grid viewing and editing
- Security Administration: access levels by user
- Units of measure, fiscal years and organizations
- Transactions: void, reinstate and export
- Grid filters

Payables: approve, release and export

Overview

Use the Payable Entry Screen to approve vendor invoices, print the Payable Entry Report, release approved payments and export payables to ARS Invoice Entry.

This page covers how to:

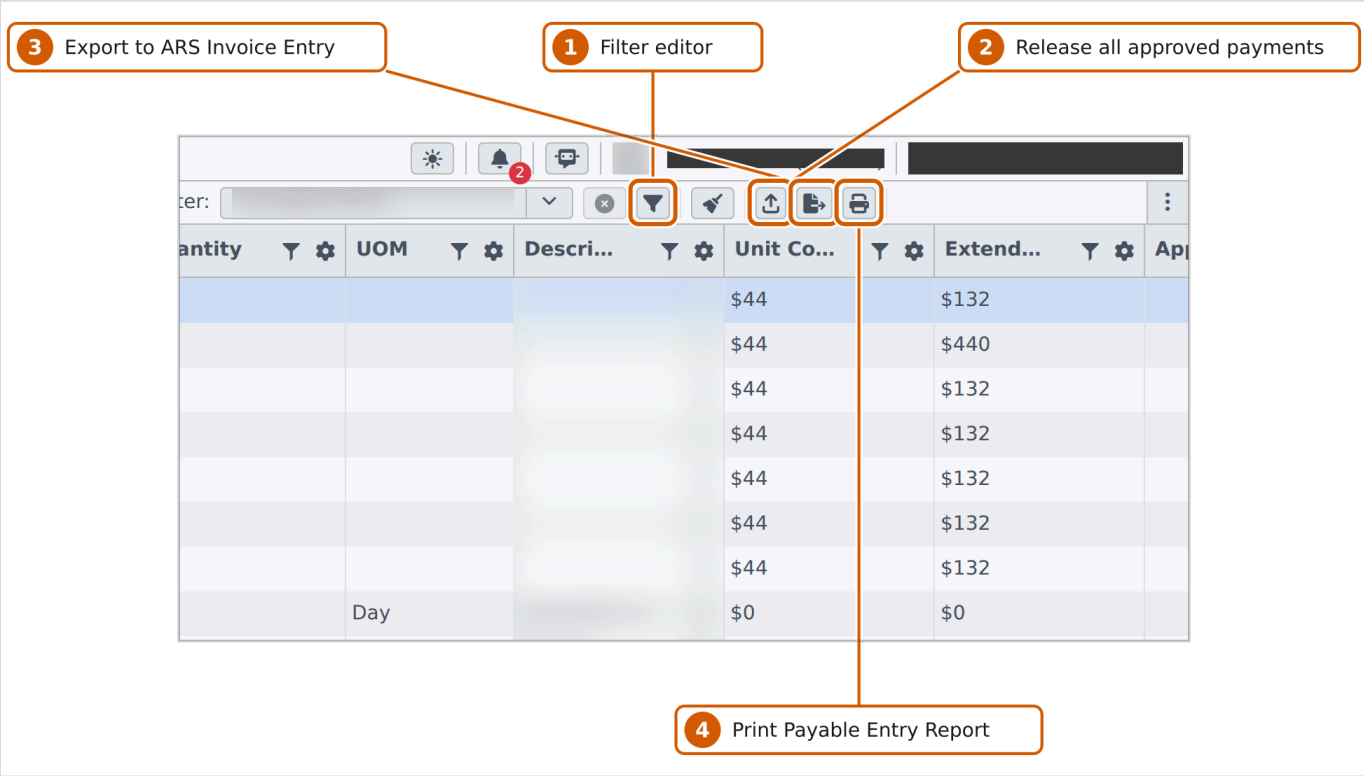
- Approve or unapprove one payable with its **Approved** switch, or every payable in the current filter with **Approve All** and **Unapprove All**.
- Print the Payable Entry Report for the payables in the current filter before you pay them.
- Release all approved payments in the current filter with a **Payment Date** and the user rules you want checked.
- Read what a release creates and why some payables stay on the screen.
- Export selected payables to ARS Invoice Entry for billing.

> **Important: Approve All**, **Unapprove All**, **Release all approved payments** and **Print Payable Entry Report** act on every payable that matches the current filter, not only the selected rows or the rows on screen. Filter the grid first.

Before you begin

- Sign in to IRIS10 and open the Payable Entry Screen in the Accounts Payable portal.
- Make sure you have security level **1 - Read Only** or higher on the Payable Entry Screen to release approved payments. You need **4 - Can Post** for **Approve All**, **Unapprove All**, **Export to ARS Invoice Entry** and **Print Payable Entry Report**. Administrators grant these levels as described in Security Administration: access levels by user.
- Know how to filter the grid. See Grid filters.
- To select rows for export, see Data grid overview and basics.

Procedure



The Payable Entry Screen toolbar. Filter the grid first, then release, export or print.

1. **Filter editor** — Filter to the payables you want to act on.
2. **Release all approved payments**
3. **Export to ARS Invoice Entry** — Uses the selected rows.
4. **Print Payable Entry Report**

Approve or unapprove a single payable

1. Open the Payable Entry Screen and find the payable row. Filter the grid if needed.

   The grid lists payables with columns such as **Vendor**, **Invoice Number**, **Invoice Date**, **Unit Cost**, **Extended Cost** and **Approved**.
2. Turn the **Approved** switch on that row on to approve the payable, or off to unapprove it.

   The change saves as soon as you switch it. There is no prompt and no Save step. The grid refreshes when the record is updated. If something goes wrong, a message appears instead.

   > **Note:** Saving the switch also depends on your security level for this screen.

Approve or unapprove every payable in the current filter

1. Filter the grid so it shows only the payables you want to change.

   Only the payables you want to approve or unapprove match the filter.

2. Click the **Approve All** toolbar button (tooltip "Click to approve all invoices."), or choose **Options** > **Approve All**.

   A confirmation appears: "Attention: Confirm the approval of all records?" with **Yes** and **No** buttons.

   > **Note:** This action requires security level **4 - Can Post**.

   > **Note:** To unapprove, click the **Unapprove All** toolbar button (tooltip "Click to unapprove all invoices.") or choose **Options** > **Unapprove All** instead. The confirmation reads "Attention: Confirm the unapproval of all records?"

3. Click **Yes** to apply the change.

   Every payable matching the current filter is approved (or unapproved), not only the rows on screen or the selected rows. The grid refreshes when at least one record changed.

   > **Note:** To stop without changing anything, click **No**.

Print the Payable Entry Report

1. Filter the grid to the payables you want on the report.

   The grid shows the payables you want to report on.

2. Click **Print Payable Entry Report** on the toolbar (tooltip "Click to print the payable entry report"), or choose **Options** > **Print Payable Entry Report**.

   The **Payment Date** window opens with a date picker and **Ok** and **Cancel** buttons.

   > **Note:** This action requires security level **4 - Can Post**.

3. Choose the date to show on the report. It defaults to today.
4. Click **Ok**.

   IRIS10 builds the report for the payables in the current filter using the date you entered.

5. Review the report, then close the preview.

   The preview closes. Printing does not prompt you to release and changes no data.

Release all approved payments

1. Filter the grid so that only the payables you intend to pay match the filter.

   Release acts on every approved payable that matches the current filter.

2. Make sure each payable to be paid has its **Approved** switch on, and that payables you are not paying yet have it off.

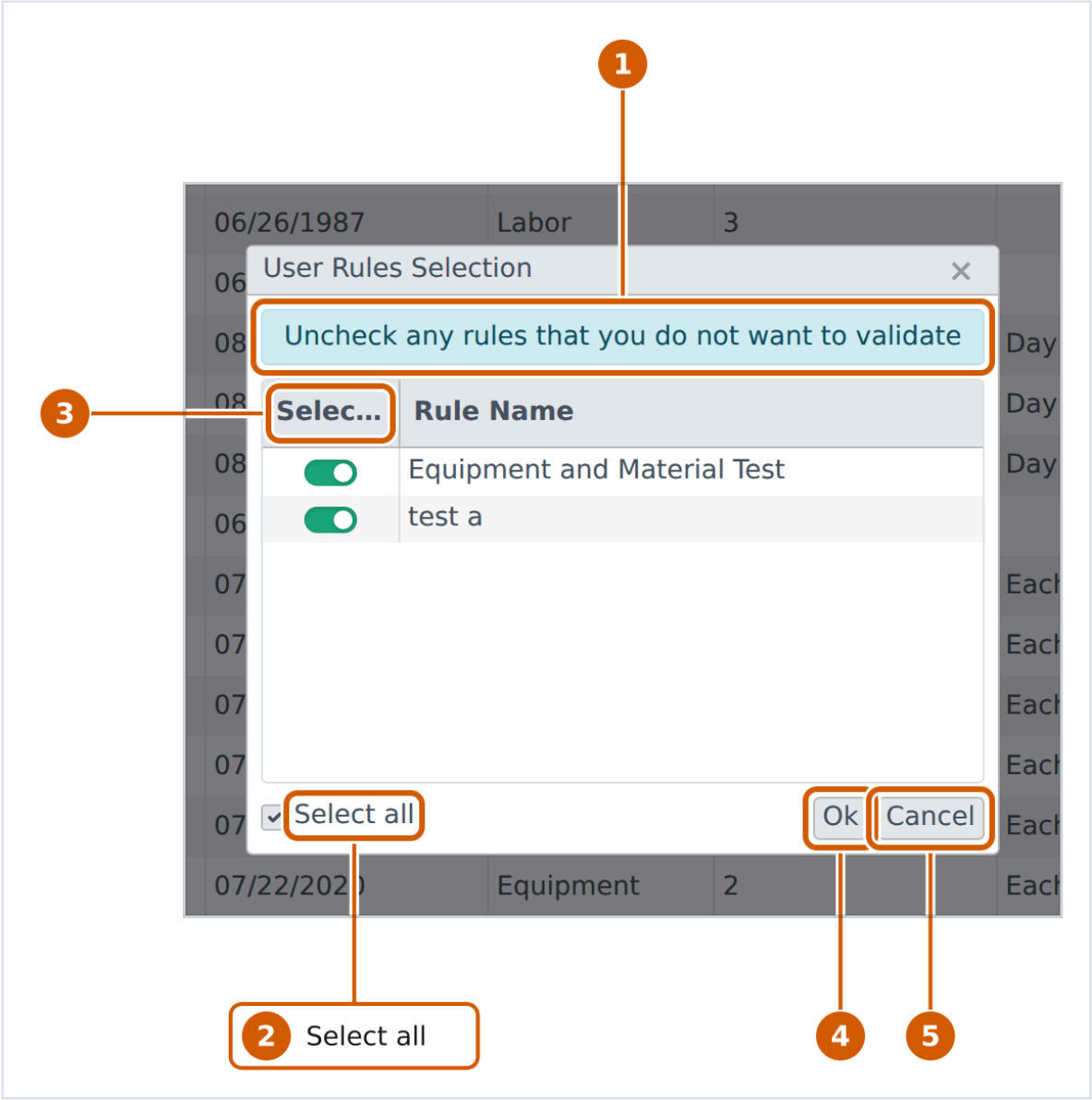
   Only approved payables can be released.

3. Click **Release all approved payments** on the toolbar (tooltip "Click to release all approved payments."), or choose **Options** > **Release All Approved Payments**.

   The **User Rules Selection** window opens with the instruction "Uncheck any rules that you do not want to validate", a rule list with **Selected** and **Rule Name** columns, a **Select all**

checkbox, and **Ok** and **Cancel** buttons.

> **Note:** This action requires security level **1 - Read Only**.



Release all approved payments opens User Rules Selection first. Uncheck any rules you do not want to validate.

1. **Instruction**
2. **Select all**
3. **Selected / Rule Name columns**
4. **Ok**
5. **Cancel**

4. Turn off the **Selected** switch for each rule you do not want checked during this release. The rules left checked are used to validate the payables.
5. To check or clear every rule at once, use **Select all**.

Select all starts out checked.

6. Click **Ok** (tooltip "Use the selected rules for posting and validation.").

   If no payable is approved, "Attention: There are no approved records present. Approve record(s) and try again." appears and the release stops. Otherwise "Attention: Confirm the release of all approved payments?" appears with **Yes** and **No** buttons.

   > **Note:** To stop, click **Cancel** (tooltip "Cancel the current posting operation.") or close the window instead. If you close the window, "Posting canceled." appears and nothing is released.

7. Click **Yes** to continue.

   The **Payment Date** window opens with "Enter payment date.", a date picker set to today, and **Ok** and **Cancel** buttons.

   > **Note:** To stop without changes, click **No**.

8. Enter the **Payment Date**.

   IRIS10 records this date on the released payable transactions.

9. Click **Ok** to continue the release.

   A loading indicator shows.

   > **Note:** To close the window without releasing, click **Cancel**.

10. Read the result.

    On success the grid reloads and "Payment released successfully." appears. A technical failure shows "Failed to release payment due to a technical error. An email has been sent to support." IRIS10 also sends you a Payment release notification with the result. See Notifications.

11. If posting errors are listed, review them in the **Posting Messages** window and fix the payables named there.

    The **Posting Messages** window lists each error by task date, vendor name, invoice number and error message.

Export payables to ARS Invoice Entry

1. Select the payable rows you want to export. Click a plain text cell, not the **Approved** switch.

   Export acts only on the selected rows.

2. Click **Export to ARS Invoice Entry** on the toolbar (tooltip "Click to Export ARS Invoice Entry"), or choose **Options** > **Export to ARS Invoice Entry**.

   If no rows are selected, "Please select grid rows before exporting records." appears. Otherwise a window titled **Export to APS** opens with **Customer** and **Organization** drop-downs and **Export** and **Cancel** buttons.

   > **Note:** This action requires security level **4 - Can Post**.

3. Choose the **Customer** to bill (placeholder "Select a customer").

   You can type in the drop-down to search.
4. Choose the **Organization** (placeholder "Select a organization").
5. Click **Export**.

   If **Customer** or **Organization** is missing, "Please select a customer and organization." appears and nothing is exported. Otherwise valid payables become ARS invoice approval records for that customer and organization.

   > **Note:** To close the window without exporting, click **Cancel**.
6. Read the result message and check the highlighted rows.

   The grid reloads and shows "{n} record(s) were exported to ARS." or "No records were exported to ARS. Any records with errors will be highlighted on the grid." Rows that failed are highlighted as errors and keep the reason as their error message. Exported rows are highlighted as successful, stay on the Payable Entry Screen and are marked **Post To AR**.

Reference

Toolbar buttons and Options menu items

TOOLBAR BUTTON (TOOLTIP)	OPTIONS MENU ITEM	SECURITY LEVEL	ACTS ON
Release all approved payments (Click to release all approved payments.)	**Release All Approved Payments**	1 - Read Only	Every approved payable matching the current filter
Approve All (Click to approve all invoices.)	**Approve All**	4 - Can Post	Every payable matching the current filter
Unapprove All (Click to unapprove all invoices.)	**Unapprove All**	4 - Can Post	Every payable matching the current filter
Print Payable Entry Report (Click to print the payable entry report)	**Print Payable Entry Report**	4 - Can Post	Payables matching the current filter; changes no data
Export to ARS Invoice Entry (Click to Export ARS Invoice Entry)	**Export to ARS Invoice Entry**	4 - Can Post	Selected rows only

Release checks that keep a payable from being released

CONDITION	MESSAGE ON THE PAYABLE	WHAT TO DO
Post To CAS is on and Task Date is empty	Missing Task Date: Task Date must be entered to post to CAS	Enter the Task Date, then release again
Post To CAS is on and Activity is empty	Missing Activity: Activity must be entered to post to CAS	Enter the Activity, then release again

CONDITION	MESSAGE ON THE PAYABLE	WHAT TO DO
The same vendor and invoice number were already released and not voided	A duplicate invoice error	Check for a duplicate payable; void the earlier transaction only if it was wrong
The payable breaks a user rule selected in **User Rules Selection**	The rule name	Correct the payable, or uncheck the rule if it should not apply
The payable is not approved	Not released; stays on the screen	Turn on **Approved** if it should be paid

For how user rules are set up, see Timecard rules.

What a release creates

RESULT	DETAILS
Payable transaction	Each released payable becomes a payable transaction with a batch number, the vendor's check number, the **Payment Date** you entered and a release date of now. See Payable transactions: void, duplicate and reassign.
Check numbers	One check number per vendor, so all of a vendor's payables in the run share it
Cost Accounting transaction	Created when **Post To CAS** is on, dated by Task Date and described as "Vendor name - description". Bill rate is the unit cost only on billable projects, otherwise 0. See Transactions: void, reinstate and export.
Inventory receipt	When **Post To Inventory** is on and an Inventory Location is set, stock is received as "Accounts Payable Receipt" (or "Accounts Payable Return" for a negative quantity). Lines without an Inventory Location move no stock. See Posting inventory.
Budget balances	Expenditure budget detail balances are recalculated. See Expenditure budgets.
Payable Entry Screen	IRIS10 removes released payables from the screen. Unapproved payables stay.

Export to ARS Invoice Entry messages

MESSAGE	MEANING
Please select grid rows before exporting records.	No rows were selected
Please select a customer and organization.	**Customer** or **Organization** was left empty
APS Invoice already exported to AR	The payable was exported before
Task Date is null	The payable has no Task Date
Quantity is null	The payable has no Quantity
Not associated with a billable project	The payable's project is not billable
{n} record(s) were exported to ARS.	Export succeeded for n payables
No records were exported to ARS. Any records with errors will be highlighted on the grid.	Nothing was exported; check the highlighted rows

Fields on exported ARS invoice approval records

ARS FIELD	COMES FROM
Customer and organization	The values chosen in the export window
Date of service	The payable's Task Date
Bill rate	The payable's Unit Cost
Description	The payable's description, or "Missing Description" if empty

Exported payables arrive in ARS Invoice Entry for approval and issue. See Invoice entry: approve and issue.

Terms

- **Approved**: Switch on each payable row. A payable must be approved before it can be released. Switching it saves immediately.
- **Post To CAS**: When on, releasing the payable also creates a Cost Accounting transaction. Task Date and Activity are then required.
- **Post To Inventory**: When on and an Inventory Location is set, releasing the payable receives (or returns) stock at that location.
- **Post To AR**: Read-only flag set when the payable has been exported to ARS Invoice Entry.
- **User Rules Selection**: Window that opens first when you release. It lists user rules with a **Selected** switch so you can choose which rules validate the release.
- **Payment Date**: Window and date used for release (recorded on the payable transactions) and for the Payable Entry Report. It defaults to today.
- **Posting Messages**: Window listing release errors by task date, vendor name, invoice number and error message.
- **Extended Cost**: Read-only amount calculated from the payable's quantity and unit cost.

Tips and notes

Important: Approve All, **Unapprove All**, **Release all approved payments** and **Print Payable Entry Report** act on every payable that matches the current filter, not only the selected rows or the rows on screen. Filter the grid first.

Important: The **Approved** switch saves as soon as you switch it. There is no prompt and no Save step, so switch carefully.

Note: Export to ARS Invoice Entry is different from the other actions: it uses only the rows you select.

Note: All of a vendor's payables released in the same run share one check number.

Note: Released payables leave the Payable Entry Screen and appear as payable transactions. Exported payables stay on the Payable Entry Screen and are marked **Post To AR**. You cannot edit **Post To AR**.

Tip: IRIS10 skips incomplete user rules during release validation. Check the rule set-up if a rule you expected was not applied.

Tip: Closing the report preview after **Print Payable Entry Report** never starts a release, so you can use the report to review payables before you pay them.

Note: The export window is titled **Export to APS** even though it exports to ARS Invoice Entry.

Tip: To show hidden grid columns, see Grid configurations.

Related topics

- Grid filters
- Notifications
- Payable transactions: void, duplicate and reassign
- Expenditure budgets
- Invoice entry: approve and issue
- Transactions: void, reinstate and export
- Posting inventory
- Timecard rules
- Security Administration: access levels by user
- Grid configurations
- Data grid overview and basics

Payable transactions: void, duplicate and reassign

Overview

The **Payable Transaction** screen lists released Payable Transactions. Rows are sorted by **Invoice Date**, newest first, and you can select more than one row.

From this screen you can:

- Find released Payable Transactions.
- Print the invoice for a selected transaction.
- Copy transactions back to the Payable screen as new, unapproved payables.
- Change the organization on selected transactions with Reassign Organization.
- Void transactions, or Reinstate them to the Payable screen, including whole-invoice handling.

The toolbar has four actions: **Re-assign organization**, **Duplicate rows to payable entry screen**, **Void payable transaction record(s)** and **Print invoice**. Each action also has an **Options** menu item. See Reference.

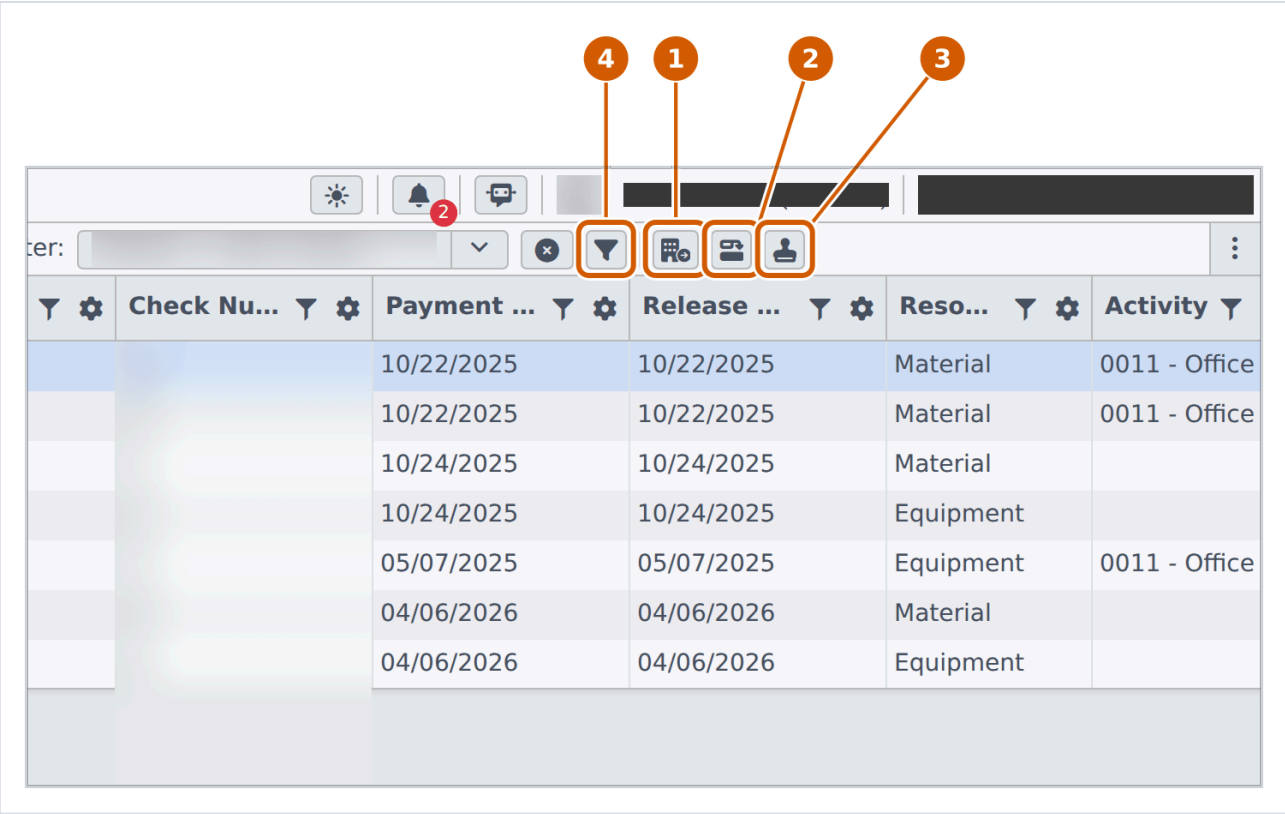
Before you begin

- Sign in to IRIS10.
- Make sure you have access level 4 on the Payable Transaction screen to use the toolbar actions. See Security Administration: access levels by user.
- Know how to select rows, use filters and use grid configurations. See Data grid overview and basics.

Procedure

Find Payable Transactions

1. Open the **Payable Transaction** screen (the browser shows the path `/aps/transact`).
   The grid opens with its toolbar. Rows are sorted by **Invoice Date**, newest first.



The Payable Transaction screen and its toolbar.

1. Re-assign organization
2. Duplicate rows to payable entry screen
3. Void payable transaction record(s)
4. Filter editor

2. To narrow the list, click **Filter editor** on the toolbar and build a filter, for example on **Invoice Number** or **Vendor**. For more about filters, see Grid filters.

   The grid shows only matching rows.
3. To remove the filter, click **Clear filter**.

   The grid shows all rows again.
4. Select the rows you want to work with. You can select more than one row.

   The rows are highlighted as selected.

Print an invoice

1. Select a row that belongs to the invoice you want to print.

   If no row is selected, IRIS10 shows "Please select an invoice to print."
2. Click **Print invoice** on the toolbar. If the button is not shown, look in the toolbar's overflow menu.

   The APS Invoice Report is produced for that row's invoice number. If you selected several rows, IRIS10 uses only the first selected row. No data changes.

> **Note:** This action requires access level 4 on Payable Transaction. You can also choose **Options** > **Print Selected Invoice**.

Duplicate transactions to payable entry

1. Select the transaction rows to copy.

   If nothing is selected, IRIS10 shows "Please select records to duplicate to payable entry."
2. Click **Duplicate rows to payable entry screen** on the toolbar.

   IRIS10 asks "Are you sure you want to duplicate the selected records(s) in the payable entry screen?" with **Yes** and **No**.

   > **Note:** The toolbar button requires access level 4 on Payable Transaction. You can also choose **Options** > **Duplicate Selected Row(s) in Payable Entry Screen**.
3. Click **Yes** to copy the rows.

   "Records have been copied to payable entry." appears. IRIS10 adds new, unapproved rows to the Payable screen. The original transactions do not change, and this grid does not reload.

   > **Note:** Click **No** to stop.
4. Open the Payable screen. See Payables: approve, release and export.

   The new rows appear on the Payable screen.
5. Approve the new rows on the Payable screen.

   The rows are approved again there.

Re-assign the organization

1. Select the transaction rows whose organization you want to change.

   If nothing is selected, IRIS10 shows "Please select records to reassign their organization."
2. Click **Re-assign organization** on the toolbar.

   IRIS10 asks "Are you sure you want to change the Organization for these N rows?" with **Yes** and **No**.

   > **Note:** This action requires access level 4 on Payable Transaction. You can also choose **Options** > **Reassign Organization**.
3. Click **Yes**.

   The **Reassign Organization** window opens.
4. In the list ("Select an organization..."), type part of the name and choose the new organization. For the organizations offered, see Units of measure, fiscal years and organizations.

   The organization is shown in the list.
5. Click **Ok**.

"Records have been reassigned." appears and the grid reloads. Only the organization of the selected rows changes. If you did not choose a valid organization, "Invalid organization selected. Please try again." appears and nothing changes.

> **Note:** Click **Cancel** to close the window without changes.

Void or Reinstate transactions

> **Important:** The prompt in step 2 has no cancel. Both **Reinstate** and **Void** act on your selection. Check your selection before you continue.

1. Select the transaction rows to Void or Reinstate, and check the selection carefully before continuing.

   If nothing is selected, IRIS10 shows "You must first select records to void."
2. Click **Void payable transaction record(s)** on the toolbar.

   IRIS10 asks "Do you want to reinstate these records?" with the buttons **Reinstate** and **Void**. There is no cancel button: both buttons act.

   > **Note:** This action requires access level 4 on Payable Transaction. You can also choose **Options** > **Void Records**.
3. Click **Reinstate** to return the lines to the Payable screen.

   If you selected every line of each affected invoice, the action completes (see step 6). Reinstated lines appear on the Payable screen as new, unapproved payables.

   > **Note:** Click **Void** instead to remove the lines. The same result applies when you selected every line of each affected invoice.
4. If your selection left out other lines of the same invoice, review the **Confirm Void - Affected Records** window.

   The window lists all line items of the affected invoices (up to 25 invoices), grouped by invoice number. The **Included By** column shows "Your selection" or "The split". The alert explains how many additional line items, and their total, share these invoices, and that the whole invoice must Void or Reinstate together. You can export the list to Excel from the window's toolbar.
5. Click **Void Entire Invoice(s)** (or **Reinstate Entire Invoice(s)**) to include the whole invoice.

   IRIS10 adds the missing line items of the same invoices and runs the action.

   > **Note:** Click **Cancel** to stop. Cancel makes no change.
6. Read the completion message.

   The message reads "Voiding Complete on N records" (Void) or "Voiding Complete, N records are reinstated" (Reinstate). When IRIS10 added whole-invoice lines, the message continues "(M additional line item(s) from the same invoice(s) were included)". The grid reloads.

Reference

Payable Transaction actions

TOOLBAR BUTTON	TOOLTIP	OPTIONS MENU ITEM	WHAT IT DOES
Re-assign organization	Click to reassign organization.	**Reassign Organization**	Changes only the organization of the selected rows.
Duplicate rows to payable entry screen	Click to duplicate rows to the payable entry screen.	**Duplicate Selected Row(s) in Payable Entry Screen**	Copies selected rows to the Payable screen as new, unapproved rows; originals stay.
Void payable transaction record(s)	Click to void payable transaction record(s).	**Void Records**	Voids the selected rows, or Reinstates them to the Payable screen.
Print invoice	Click to print the selected invoice.	**Print Selected Invoice**	Prints the APS Invoice Report for the first selected row's invoice; no data changes.

What Void and Reinstate change

AREA	EFFECT
Payable Transaction lines	Void removes them. Reinstate removes them here and returns them to the Payable screen as new, unapproved payables.
Cost Accounting transactions	IRIS10 removes the matching transactions and records them in audit history. See Transactions: void, reinstate and export.
Inventory	For lines posted to inventory with an inventory location, IRIS10 reverses the inventory receipt. See Posting inventory.
Budgets	IRIS10 recalculates budget balances from the remaining (non-voided) Payable Transactions. See Expenditure budgets.
Invoices	All line items of an invoice Void or Reinstate together.

Confirm Void - Affected Records columns

COLUMN	MEANING
Included By	"Your selection" for rows you selected; "The split" for other lines of the same invoice
Vendor	Vendor of the line
Invoice Date	Invoice date
Resource Type	Resource type of the line
Description	Line description
Quantity	Quantity
Unit Cost	Unit cost
Extended Cost	Extended cost

Messages

MESSAGE	MEANING / WHAT TO DO
Please select an invoice to print.	Select a row, then print.
Please select records to duplicate to payable entry.	Select rows, then duplicate.
Records have been copied to payable entry.	Duplicate succeeded; check the Payable screen.
Please select records to reassign their organization.	Select rows first.
Invalid organization selected. Please try again.	Choose an organization from the list, then click **Ok**.
Records have been reassigned.	Reassign succeeded.
You must first select records to void.	Select rows first.
No records were supplied to void.	No rows reached the Void; select rows and try again.
Your session has expired. Refresh the page and sign in again before voiding records.	Refresh the page and sign in again.
Invoice(s) X have additional line items that were not selected. Do you want to void\	reinstate the entire invoice(s)?
Voiding Complete on N records / Voiding Complete, N records are reinstated	Void or Reinstate succeeded.

Tips and notes

Important: The Void prompt has no cancel: both **Reinstate** and **Void** act on your selection. Check the selected rows before clicking **Void payable transaction record(s)**.

Important: Void and Reinstate also remove the matching Cost Accounting transactions, reverse posted inventory receipts and recalculate budget balances.

Note: An invoice voids or reinstates as a whole. If you select only some of its lines, IRIS10 shows the other lines so you can confirm the whole invoice or cancel.

Note: Reinstated and duplicated rows arrive on the Payable screen unapproved. You must approve them again there.

Tip: Print invoice uses only the first selected row. Select one row per invoice you want to print.

Tip: If a toolbar button is not visible, look in the toolbar's overflow (more) menu. The same actions are also on the **Options** menu.

Related topics

- Payables: approve, release and export
- Transactions: void, reinstate and export
- Posting inventory
- Expenditure budgets
- Grid filters
- Data grid overview and basics
- Security Administration: access levels by user
- Units of measure, fiscal years and organizations

Expenditure budgets

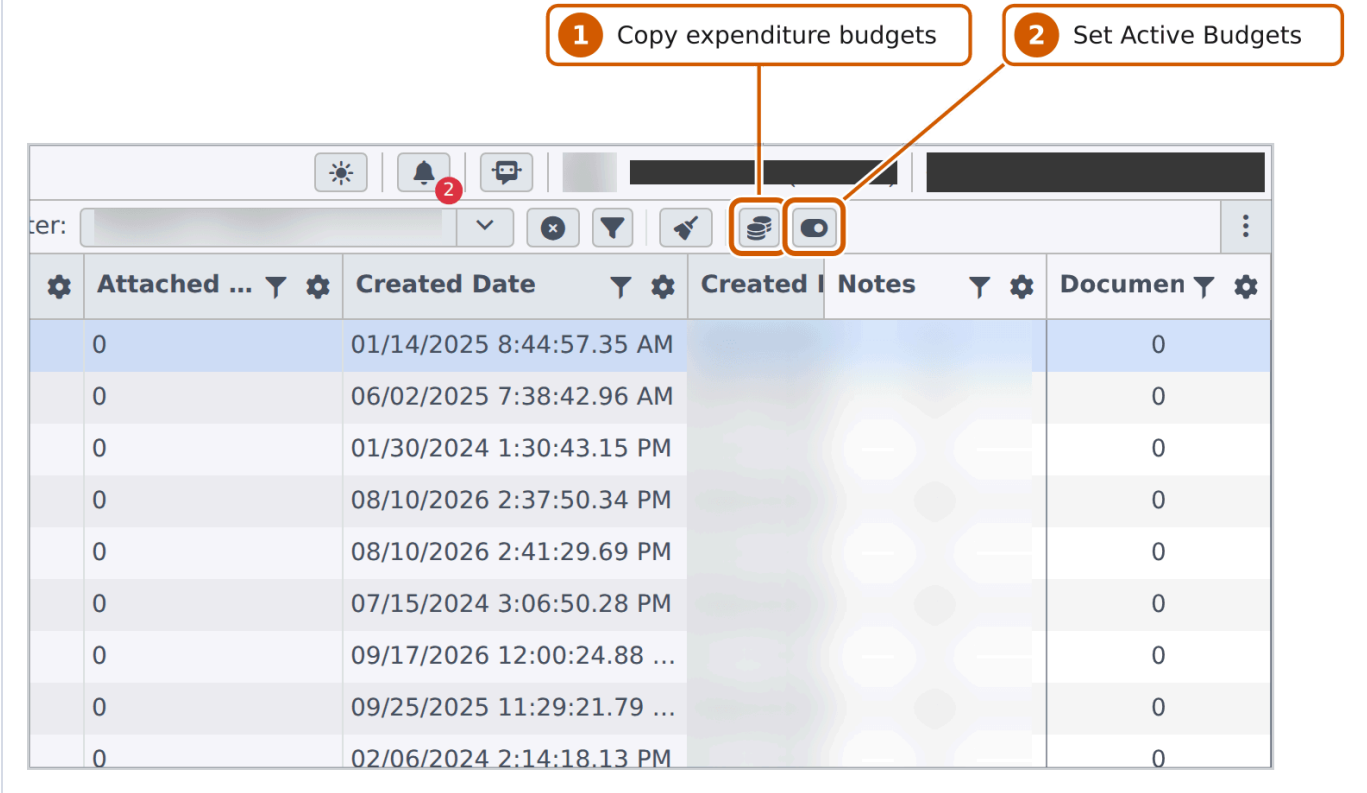
Overview

The **Expenditure Budgets** screen (Accounts Payable > Expenditure Budgets) is where you keep budgets. The main grid lists the budgets. Each budget has an expandable child grid of budget details for one or more fiscal years, with the fiscal-year balances. The child grid lists only Active budget details unless **Show Inactive Budget Details** is turned on.

From this screen you can:

- Show or hide inactive budget details with **Show Inactive Budget Details**.
- Carry budgets forward into a new fiscal year with the Copy Expenditure Budgets window.
- Set all budget details for a fiscal year to Active or Inactive at once with the Set Active Expenditure Budgets window.

To add and edit records in the grids, see Grid viewing and editing. For how parent and child grids and toolbars work, see Data grid overview and basics.



The Expenditure Budgets screen. The copy and Set Active Budgets buttons are on the toolbar.

1. Copy expenditure budgets
2. Set Active Budgets

Before you begin

- Sign in to IRIS10 (see Logging in).
- Make sure you have access to the Accounts Payable > Expenditure Budgets screen. For help finding it, see Navigating portals and pages.
- For Copy and Set Active, you need level 4 on the Expenditure Budgets screen. See Security Administration: access levels by user.
- Set up your fiscal years first. See Units of measure, fiscal years and organizations.

Procedure

Show or hide inactive budget details

1. Open Accounts Payable > Expenditure Budgets. The budgets grid opens. Expanding a budget shows its budget details. By default only Active details are listed.
2. Select the **Show Inactive Budget Details** checkbox on the toolbar. The grid reloads, and the budget-detail grids now include inactive details. No data is changed.

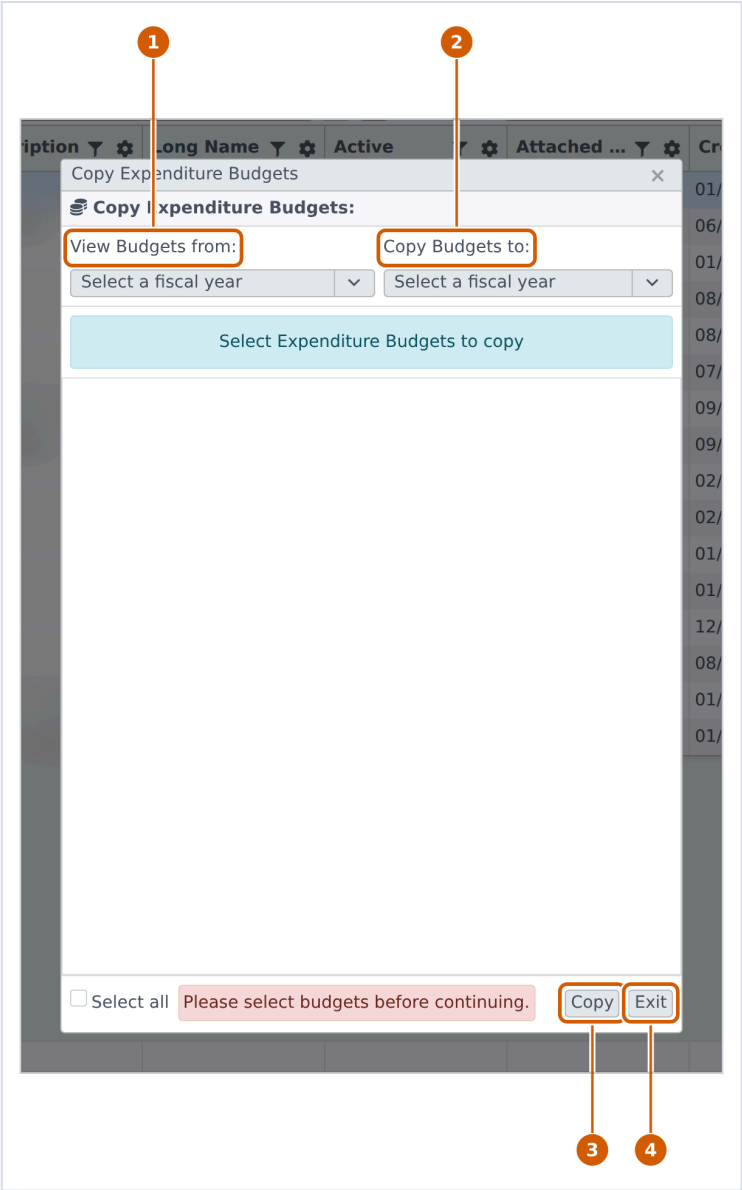
   > **Note:** You can also choose **Options** > **Show Inactive Budget Details**.

3. To hide inactive details again, clear the **Show Inactive Budget Details** checkbox. The grid reloads and shows only Active budget details. If the change cannot be saved, the checkbox goes back to its previous setting.

Copy expenditure budgets to another fiscal year

1. Open Accounts Payable > Expenditure Budgets. The budgets grid opens.
2. On the toolbar, click the button with the tooltip "Click to copy expenditure budgets." The Copy Expenditure Budgets window opens with the banner "Select Expenditure Budgets to copy". If no budgets have fiscal years, you see "There are no budgets with associated fiscal years to copy." and the window closes.

   > **Note:** This button needs access level 4 on the Expenditure Budgets screen. You can also choose **Options** > **Copy Expenditure Budgets**.



The Copy Expenditure Budgets window: choose the fiscal year to copy from and the year to copy to, then select the budgets.

1. View Budgets from:
2. Copy Budgets to:
3. Copy (acts at once)
4. Exit

3. In **View Budgets from:**, choose the fiscal year you want to copy from. The newest fiscal years appear at the top of the list. The budgets for the chosen year load into the list below, sorted by Name Desc.
4. In **Copy Budgets to:**, choose the fiscal year you want to copy into. This list shows the organization's fiscal years, not just years that already have budgets.
5. Select the budgets to copy in the list. You can select more than one. The budgets are highlighted.

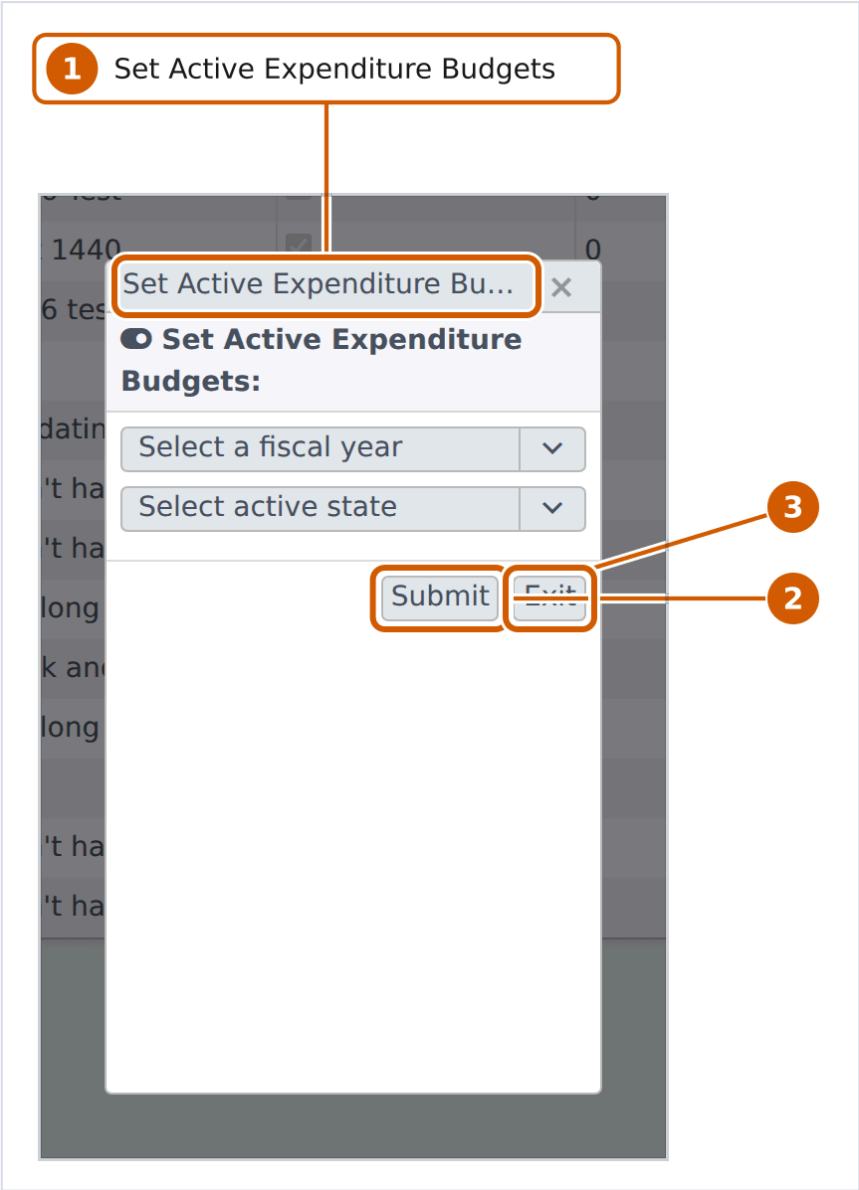
> **Note:** To copy every budget in the list, select **Select all**. If you change the selection by hand after using **Select all**, **Select all** is cleared.

6. Click **Copy**. The copy runs straight away, with no further confirmation. Both fiscal years and at least one budget are required. If no budgets are selected, the copy is not sent.
7. Read the result message. If it worked, you see "{N} expenditure budgets copied from: {from year} to: {to year}, successfully." If nothing could be copied, you see "No APS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year".
8. Click **Exit** to close the window. The window closes. **Exit** makes no changes.

Set all budgets for a fiscal year to Active or Inactive

1. Open Accounts Payable > Expenditure Budgets. The budgets grid opens.
2. On the toolbar, click **Set Active Budgets** (tooltip "Click to set active state for expenditure budgets by fiscal year."). The Set Active Expenditure Budgets window opens. If no budgets have fiscal years, you see "There are no budgets with associated fiscal years." and the window closes.

> **Note:** This button needs access level 4 on the Expenditure Budgets screen. This action is not on the **Options** menu.



The Set Active Expenditure Budgets window. Submit changes every budget detail in the chosen fiscal year.

1. Set Active Expenditure Budgets
2. Submit (whole fiscal year)
3. Exit

3. In the fiscal-year list (placeholder "Select a fiscal year"), choose the fiscal year. The current status appears. It reads "Currently Active (N records)", "Currently Inactive (N records)", "X Active, Y Inactive of N records", or "No budget details found for this fiscal year".
4. In the state list (placeholder "Select active state"), choose **Active** or **Inactive**. The state you chose is shown.
5. Click **Submit**. The change applies straight away, with no further confirmation. Every budget detail in that fiscal year is set to the chosen state, whatever is selected or filtered in the grid. If a fiscal year or state is missing, you see "Please select both a fiscal year and an active state."

6. Read the result message. You see "Expenditure budgets for the selected fiscal year have been set to Active/Inactive successfully." The budgets grid reloads and the status text updates.
7. Click **Exit** to close the window. The window closes. **Exit** makes no changes.

Reference

Toolbar buttons and Options menu items

ACTION	WHERE	TOOLTIP	WHAT IT DOES	ACCESS
Copy expenditure budgets	Toolbar button, and **Options** > **Copy Expenditure Budgets**	Click to copy expenditure budgets.	Opens the Copy Expenditure Budgets window, which copies the selected budgets from one fiscal year into another	Level 4
Set Active Budgets	Toolbar button only	Click to set active state for expenditure budgets by fiscal year.	Opens the Set Active Expenditure Budgets window, which sets every budget detail in a fiscal year to Active or Inactive	Level 4
Show Inactive Budget Details	Toolbar checkbox, and **Options** > **Show Inactive Budget Details**	—	Shows or hides inactive budget details for the current session. Changes no data.	—

Budgets grid columns

COLUMN	NOTES
Organization	—
Name	Required. Up to 30 characters.
Description	Up to 50 characters
Name Desc	—
Long Name	Up to 50 characters
Active	Selected by default for new budgets
Attached Documents	—

Budget details (child grid) columns

COLUMN	NOTES
Fiscal	The fiscal year a budget detail belongs to
Budget Amount	—
Total Expenditure	—

COLUMN	NOTES
Remaining Balance	—
Warning Level	—
Active	Whether the budget detail is in use. Inactive details are hidden unless **Show Inactive Budget Details** is on.

What Copy creates

ITEM	RESULT IN THE DESTINATION FISCAL YEAR
Which budgets	Only the budgets you selected from the **View Budgets from:** year
Budget amount	Same as the source
Warning level	Same as the source
Balance	Set to the budget amount. The source balance is not carried over.
Active	Copied details are Active
Budget already in the destination year	Skipped. It is not overwritten or duplicated.

Messages

MESSAGE	WHEN IT APPEARS
There are no budgets with associated fiscal years to copy.	You open the copy window and no budgets have fiscal years. The window closes.
{N} expenditure budgets copied from: {from year} to: {to year}, successfully.	The copy worked
No APS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year	Nothing was copied, for example because every selected budget already exists in the destination year
Unable to copy expenditure budgets due to a technical error. An email has been sent to support.	A technical error stopped the copy
There are no budgets with associated fiscal years.	You open Set Active and no budgets have fiscal years. The window closes.
Please select both a fiscal year and an active state.	You click **Submit** without choosing both values
Expenditure budgets for the selected fiscal year have been set to Active/Inactive successfully.	Set Active worked
Unable to set active state for expenditure budgets due to a technical error. An email has been sent to support.	A technical error stopped Set Active
You can not affect a tenant you are not logged into	You tried to change budgets for an organization you are not signed in to

Tips and notes

Important: Copy and Submit act as soon as you click them. There is no extra confirmation, so check both fiscal years and your selection first.

Important: Set Active changes every budget detail in the chosen fiscal year, including ones the grid is not showing. Selections and filters in the grid make no difference. See Grid filters.

Tip: Before you click **Submit** in Set Active, read the status text after choosing the fiscal year. If it says "No budget details found for this fiscal year", **Submit** will not change anything.

Note: You can run Copy again safely. Budgets that already exist in the destination year are skipped, never duplicated or overwritten.

Note: Show Inactive Budget Details lasts only for your current session. It is not saved as a permanent setting.

Note: Copy and Set Active only affect budgets in the organization you are signed in to.

Related topics

- Grid viewing and editing
- Data grid overview and basics
- Grid filters
- Units of measure, fiscal years and organizations
- Security Administration: access levels by user
- Revenue budgets
- Navigating portals and pages

Invoice entry: approve and issue

Overview

Invoice Entry holds invoice lines that wait to be approved and issued. On this screen you review the lines, find lines with errors, approve or unapprove lines, preview the invoices, and issue all approved invoices. Issuing creates invoices, and Credit memo documents for lines with negative amounts.

The grid shows these columns: **Date Of Service**, **Description**, **Quantity**, **Bill Rate**, **Extended Cost**, **Comments**, **Approved** and **Error Message**. **Invoice Number** is hidden by default. See Invoice line fields for the rules for each column.

Before you begin

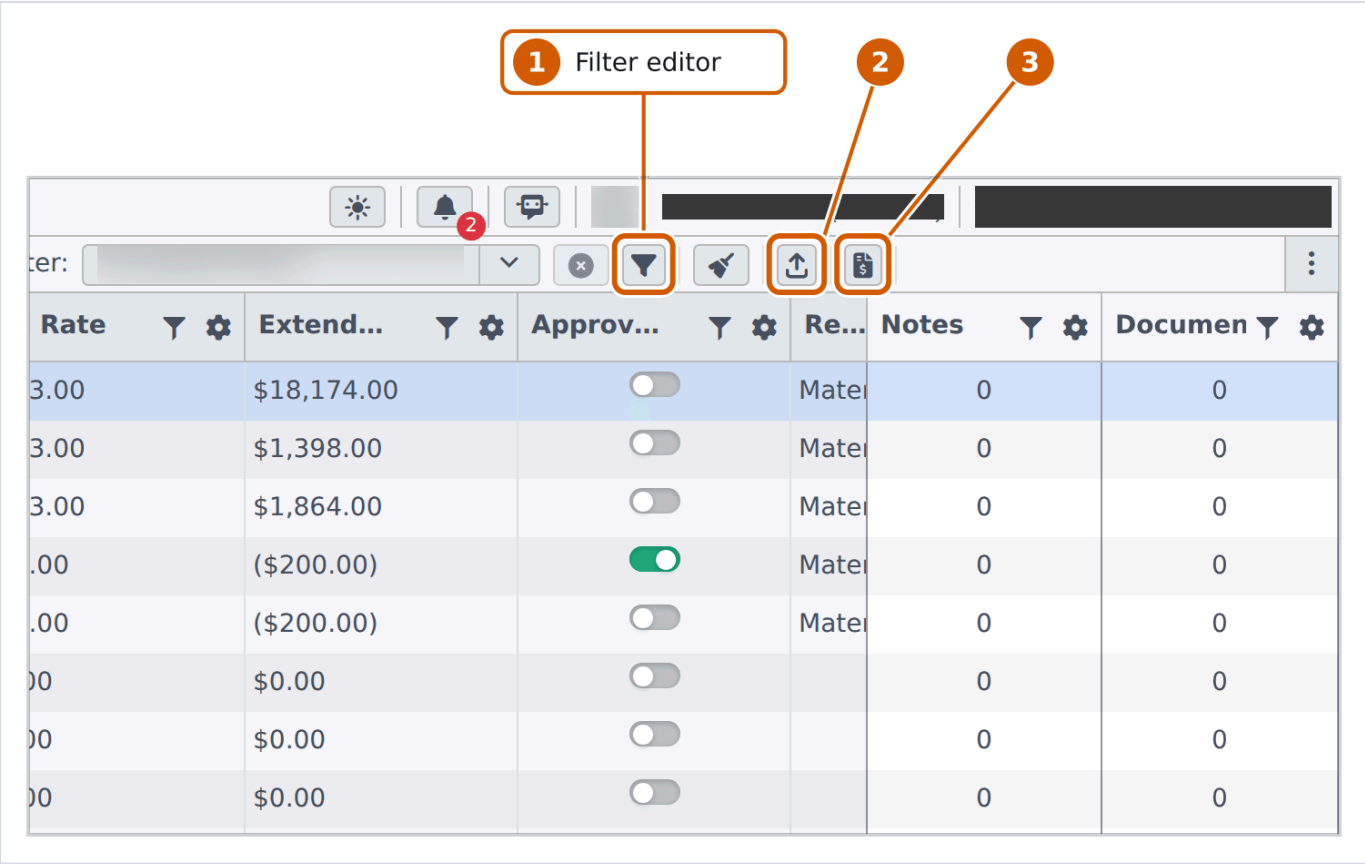
- Sign in to IRIS10.
- Make sure you have access to the **Invoice Entry** screen in the Accounts Receivable portal.
- Make sure you have access level 4 on **Invoice Entry** to approve, preview or issue invoices. See Security Administration: access levels by user.
- Know how to filter a grid. See Grid filters.

> **Important: Approve All**, **Unapprove All**, **Preview invoice**, **Preview summary invoice** and **Issue all approved invoices** act on every line that matches the current filter, not only on the rows you selected. Filter the grid first.

Procedure

Narrow the grid to the lines you want to work on

The figure shows the toolbar. Use **Filter editor** (shown in the toolbar) to narrow the grid before you use the other actions. Filter first: the actions apply to every line in the filter.



The Invoice Entry screen with its toolbar and the invoice lines waiting to be issued.

1. Issue all approved invoices
2. Preview invoice
3. Preview summary invoice

Follow these steps:

1. On the **Invoice Entry** screen, click **Filter editor** on the toolbar. The grid filter editor opens.
2. Build a filter that matches only the lines you want to approve, preview or issue, for example one customer or one organization. See Grid filters for details.
3. Apply the filter. The grid shows only the matching lines. **Approve All**, **Unapprove All**, the previews and **Issue all approved invoices** act on these lines.
4. To remove the filter later, click **Clear filter**. The grid shows all invoice lines again.

Approve or unapprove a single invoice line

1. Find the line in the grid.
2. Check the **Error Message** column for the line. If a previous issue attempt found that the line breaks a user rule, **Error Message** shows the rule's name.
3. Switch the **Approved** switch on the line on to approve, or off to unapprove. IRIS saves the change straight away. You do not need to click a save button. The grid refreshes.

> **Note:** Changing approval requires access level 4 on **Invoice Entry**.

Approve or unapprove every line in the current filter

1. Filter the grid so that it shows only the lines you want to change. The grid shows only the lines you want to change.
2. Click **Approve All** on the toolbar, or choose **Options** > **Approve All**. IRIS asks "Attention: Confirm the approval of all records?" with **Yes** and **No**.

   > **Note:** Requires access level 4 on **Invoice Entry**. To remove approval instead, click **Unapprove All** or choose **Options** > **Unapprove All**. IRIS then asks "Attention: Confirm the unapproval of all records?" with **Yes** and **No**.

3. Click **Yes**. IRIS changes every line in the current filter that is not already approved (or unapproved).

   > **Note:** To stop, click **No** instead. IRIS changes nothing.

Preview invoices before issuing

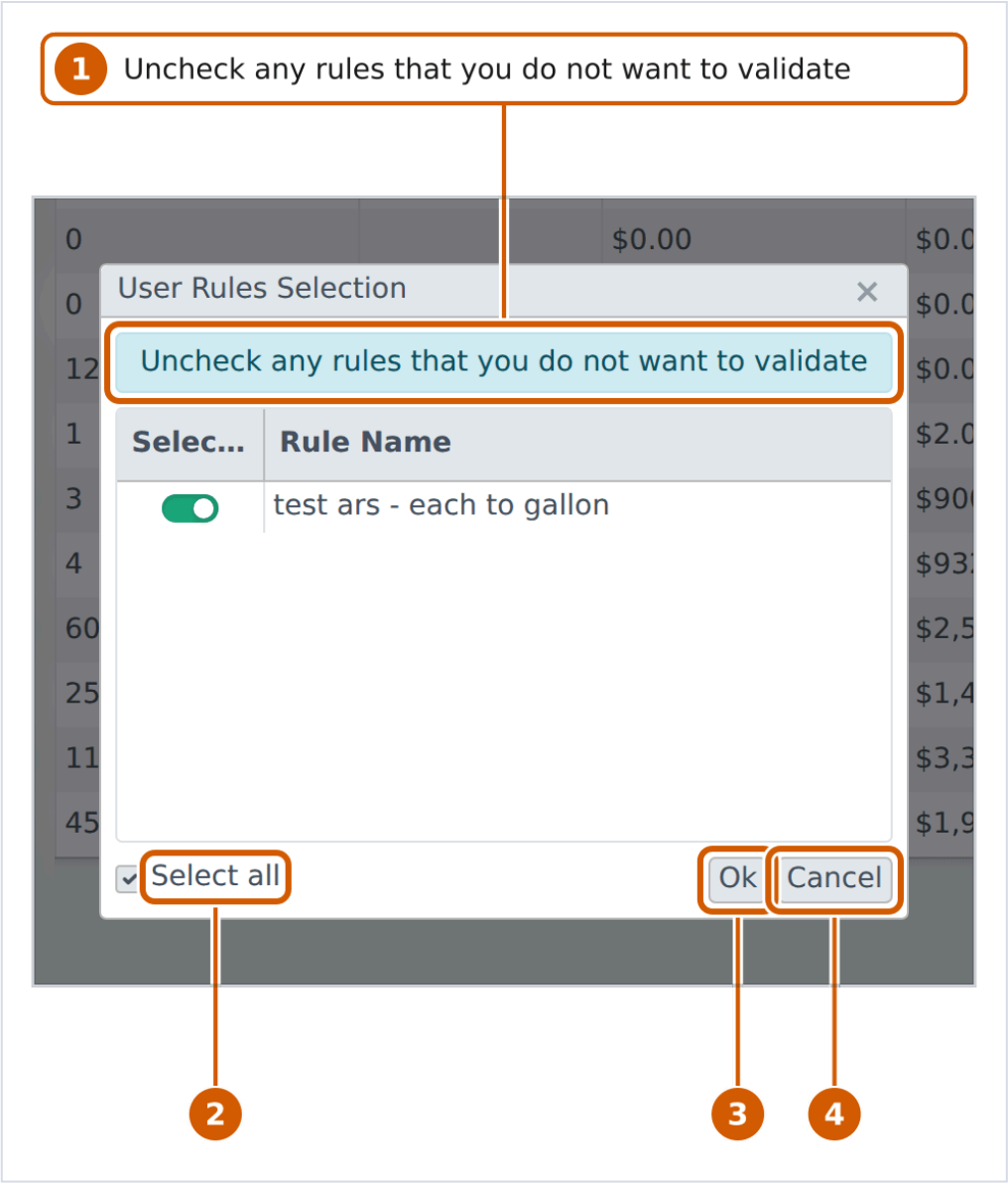
1. Filter the grid to the lines you want to preview. The grid shows the lines to preview.
2. Click **Preview invoice** for a detailed preview, or choose **Options** > **Preview Invoice**. A **Preview Invoice** window opens and shows the report. IRIS issues nothing.

   > **Note:** Requires access level 4 on **Invoice Entry**. For a summary preview, click **Preview summary invoice** or choose **Options** > **Preview Summary Invoice**. A **Preview Summary Invoice** window opens and shows the report. IRIS issues nothing.

Issue all approved invoices

1. Filter the grid so that it shows only the approved lines you want to issue. IRIS issues only approved lines that match the current filter.
2. Click **Issue all approved invoices** on the toolbar, or choose **Options** > **Issue All Approved Invoices**. The **User Rules Selection** window opens with the message "Uncheck any rules that you do not want to validate".

   > **Note:** Requires access level 4 on **Invoice Entry**.



The User Rules Selection window that opens first when you issue approved invoices.

1. Uncheck any rules that you do not want to validate
2. Select all
3. Ok: continues to the issue confirmation.
4. Cancel: stops without issuing.

3. In the rules list, switch off any rules that you do not want to use. IRIS checks only the selected rules against the lines. **Select all** is checked by default, so IRIS uses every rule unless you clear it.

> **Note:** Use **Select all** to select or clear every rule. For information on similar rules, see Timecard rules.

4. Click **Ok**. IRIS asks "Attention: Confirm the issuance of all approved invoices?" with **Yes** and **No**.

5. Click **Yes**. The **Invoice Report Type** window opens with "Please select an invoice report type:".
6. Choose **Summary report** or **Detail report**. **Detail report** is selected by default. Your choice decides which invoice report opens after IRIS issues the invoices.
7. Click **Accept**. IRIS checks the approved lines without issuing anything. It then shows "<n> INVOICE(S) totaling $<total> will be issued by this action.", a matching CREDIT MEMO(S) line if any lines have negative amounts, and "Continue?" with **Yes** and **No**. If lines break a rule, a posting messages window lists them. If no line can be issued, the process stops there.

   > **Note:** To stop, click **Cancel** in the **Invoice Report Type** window instead of **Accept**.

8. Read the counts and totals in the message.
9. Click **Yes**. IRIS issues the invoices. The invoice report of the type you chose opens in an **Issue Invoice** window, and the grid refreshes.

   > **Note:** To stop, click **No** instead. IRIS issues nothing.

Reference

Invoice Entry toolbar

BUTTON	TOOLTIP	WHAT IT DOES	ACCESS LEVEL
Clear grid configuration	"Click to clear grid configuration."	Clears the saved grid layout. See Grid configurations.	—
Grid configuration editor	"Click to open grid configuration editor."	Opens the grid configuration editor.	—
Clear filter	"Click to clear applied grid filter."	Removes the applied filter.	—
Filter editor	"Click to open grid filter editor."	Opens the filter editor so that you can narrow the lines.	—
Bulk delete mode	"Click to enter bulk delete mode."	Starts bulk delete mode. See Grid viewing and editing.	—
Issue all approved invoices	"Click to issue all approved invoices"	Issues every approved line in the current filter.	4
Preview invoice	"Click to preview invoice"	Shows a detailed invoice preview for the current filter without issuing.	4
Preview summary invoice	"Click to preview summary invoice"	Shows a summary invoice preview without issuing.	4
Approve All	"Click to approve all invoices."	Approves every line in the current filter after you confirm.	4

BUTTON	TOOLTIP	WHAT IT DOES	ACCESS LEVEL
Unapprove All	"Click to unapprove all invoices."	Unapproves every line in the current filter after you confirm.	4

Options menu

MENU ITEM	SAME AS TOOLBAR BUTTON
Issue All Approved Invoices	**Issue all approved invoices**
Preview Invoice	**Preview invoice**
Preview Summary Invoice	**Preview summary invoice**
Approve All	**Approve All**
Unapprove All	**Unapprove All**

Invoice line fields

FIELD	RULES
Date Of Service	Required. Format `MM/dd/yyyy`.
Description	Up to 512 characters.
Quantity	Required.
Bill Rate	Required. Currency, from 0 to 999999999999999.
Extended Cost	Read-only. Calculated.
Comments	Up to 256 characters.
Approved	Switch. Saves as soon as you switch it.
Error Message	Read-only. Shows the name of a user rule that the line breaks.
Invoice Number	Hidden by default. Cannot be edited.

Messages

MESSAGE	WHEN	WHAT TO DO
Posting canceled.	You close or cancel **User Rules Selection**.	IRIS issues nothing. Start again with **Issue all approved invoices**.
Attention: There are no approved invoice records present. Approve invoice(s) and try again.	IRIS finds no approved lines.	Approve lines, then issue again.
Invoice release canceled.	You close the **Invoice Report Type** window without clicking **Accept**.	IRIS issues nothing. Start again if you mean to issue.

MESSAGE	WHEN	WHAT TO DO
No Records to Issue.	No approved lines match the current filter.	Check the filter and the **Approved** switches.
Unable to issue invoice(s) due to a technical error. An email has been sent to support.	A technical failure happens while issuing.	Contact your IRIS administrator or support.
Unable to generate invoice report. An email has been sent to support.	IRIS cannot produce the invoice report.	Contact your IRIS administrator or support.
Unable to approve invoices due to a technical error. An email has been sent to support.	A technical failure happens while approving.	Contact your IRIS administrator or support.

What issuing creates

ITEM	RESULT
Invoice	One invoice per organization and customer for lines with zero or positive amounts.
Credit memo	One Credit memo per organization and customer for lines with negative amounts. IRIS stores the amount as a positive value.
Invoice number	Your organization's invoice number prefix, plus the issue date (`MMDDYY`), plus the next number in sequence. Credit memo numbers have `CM` at the end.
Invoice date	The date of issue.
Header description	The description of the invoice's first line, or `n/a` .
Detail lines	Each issued line becomes a detail line on its invoice. Line amount = **Quantity** × **Bill Rate**, rounded to 2 decimals. A line without a description gets `n/a` .
Balance	Equals the total. IRIS marks an invoice with a zero total as fully paid.
Issued lines	IRIS removes them from **Invoice Entry**.
Lines with errors or not approved	Stay on **Invoice Entry**.
Notification	IRIS sends an "Invoice issue" notification to the user who issued the invoices. See Notifications.

Tips and notes

> **Important:** The **Approved** switch saves as soon as you switch it. There is no separate save step.

> **Tip:** Clicking **Cancel** or **No** at any step before the final **Yes** stops the process without issuing anything.

Note: Lines that break a user rule are not issued. They stay on **Invoice Entry** and show the rule's name in **Error Message**. IRIS clears the error messages and checks them again each time you start an issue.

Note: Issued invoices and Credit memo documents appear on the ARS Invoice screen, where you can print, reinstate or delete them. See Issued invoices: print, reinstate, delete and assign budgets.

Note: Some counties use their own layout for the detail invoice report, so your report may look different from the examples.

Related topics

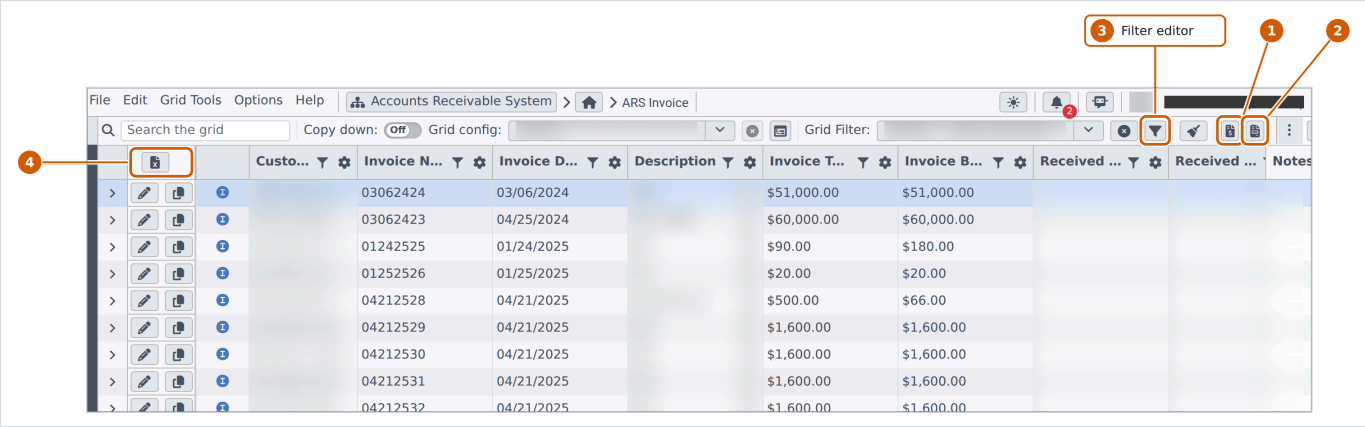
- Grid filters
- Notifications
- Issued invoices: print, reinstate, delete and assign budgets
- Timecard rules
- Grid viewing and editing
- Grid configurations
- Security Administration: access levels by user

Issued invoices: print, reinstate, delete and assign budgets

Overview

The issued invoices screen lists invoices that you have issued from Invoice entry: approve and issue. The grid lets you select several rows at once. Expand an invoice row to see its invoice detail lines in a child grid.

The **Current**, **Reinstated** and **Deleted** buttons in the screen header switch the invoices the grid shows. The toolbar and the **Options** menu hold the actions on this screen: print an invoice, print a summary invoice, reinstate invoices, delete invoices and assign a budget. An invoice type legend identifies the invoice types.



The issued invoices screen, with the print buttons on the toolbar and the invoice grid below.

1. **Print invoice**
2. **Print summary invoice**
3. **Filter editor**: the shared grid filter. Switching between **Current**, **Reinstated** and **Deleted** clears it.
4. **Grid columns**

Before you begin

- Sign in to IRIS10.
- Make sure you have access to **Accounts Receivable > Invoice**. The print, reinstate, delete and **Assign Budget** actions require access level 4. For details, see Security Administration: access levels by user.
- Issue the invoices from Invoice entry: approve and issue first.
- Know how to select rows, use filters and use configurations in the shared data grid. For details, see Data grid overview and basics.

Procedure

Choose which invoices to view

1. Open the issued invoices screen in the Accounts Receivable portal. The invoice grid opens. You can select several rows at once.
2. In the screen header, click **Current** to see open invoices. Any filter already on the grid is cleared. The grid shows invoices that are not payment complete, not canceled and not deleted.
3. Click **Reinstated** to see invoices that have been reinstated. Any filter already on the grid is cleared. The grid shows invoices marked Canceled.
4. Click **Deleted** to see invoices marked deleted. Any filter already on the grid is cleared. The grid shows invoices marked Deleted.
5. Expand an invoice row to see its invoice detail lines. A child grid lists the invoice's detail lines.

Print an invoice or summary invoice

1. Select the invoice you want to print. If no invoice is selected when you print, the message `Please select an invoice to print.` appears.
2. Click **Print invoice** on the toolbar, or choose **Options > Print Invoice**. The Invoice Detail Report is produced for the selected invoice.

   > **Note:** This action requires access level 4. Polk County uses its own version of the Invoice Detail Report.

3. To print a summary instead, click **Print summary invoice** on the toolbar, or choose **Options > Print Summary Invoice**. The ARS Invoice Summary report is produced for the selected invoice.

   > **Note:** This action requires access level 4.

4. If the message `Unable to print the current invoice. An email has been sent to support.` appears, the report came back empty. IRIS10 has already notified support.

Assign a budget to invoice lines

1. Select one or more invoices in the grid. If nothing is selected when you continue, the message `Please select at least one invoice to assign a budget.` appears.
2. Click **Assign Budget** on the toolbar. There is no **Options** menu item for this action. The **Assign Budget** window opens. It has a **Select Budget:** list (showing `Select a budget...`) and **Assign** and **Cancel** buttons.

   > **Note:** This action requires access level 4.

3. In the **Select Budget:** list, choose a revenue budget. For details on revenue budgets, see Revenue budgets.
4. Click **Assign**. The budget is applied right away to every line of all selected invoices. No further confirmation is asked. The message `Budget assigned successfully to all invoice detail records.` appears and the grid refreshes. If you did not choose a budget, `Please select a budget.` appears instead.
5. If an error says the budget is not active, choose an active budget in the **Select Budget:** list. You can assign only active budgets.
6. Click **Assign** again.

Reinstate an issued invoice

1. Click **Current**. The grid shows current invoices.
2. Select the invoice or invoices to reinstate. Make sure none of them have payments. If nothing is selected when you continue, the message `Please select at least one item to reinstate.` appears.
3. Click **Reinstate selected item(s)** on the toolbar, or choose **Options > Reinstate Selected Item(s)**. A confirmation appears: `Are you sure you want to reinstate the selected invoice(s)?` with **Yes** and **No**.

   > **Note:** This action requires access level 4.

4. Click **Yes** to continue. To cancel instead, click **No**. The issued invoice is marked Canceled and its lines go back to Invoice Entry as new unapproved lines. The grid refreshes and no success message is shown. The invoice now appears under **Reinstated**.
5. If a message lists invoices that have payments (`Could not reinstate records because the following invoices have payments:`), remove those invoices from your selection.
6. Click **Reinstate selected item(s)** again.
7. Open Invoice Entry to correct and reissue the returned lines. The lines keep their customer, organization, invoice number, activity, project, budget, contract, date of service, description, quantity, bill rate, unit of measure and comments.

Delete invoices issued in error

1. Select the invoices to delete. Make sure none of them have payments. If nothing is selected when you continue, the message `Please select at least one item to delete.` appears.
2. Click **Delete selected item(s)** on the toolbar, or choose **Options > Delete Selected Item(s)**. A confirmation appears: `This action cannot be reversed. Are you sure you want to delete the selected invoice(s)?` with **Yes** and **No**.

   > **Note:** This action requires access level 4.

3. Click **Yes** to continue. To cancel instead, click **No**. Delete removes the selected invoices (invoice, credit memo and counter sale invoices), and the grid refreshes.

4. If a message starting `Could not delete records because the following invoices have payments.` appears, remove the invoices it lists from your selection.
5. Click **Delete selected item(s)** again.

Reference

Toolbar buttons and Options menu items

All actions in this table require access level 4.

TOOLBAR LABEL	TOOLTIP	OPTIONS MENU ITEM	WHAT IT DOES
Print invoice	Click to print invoice	**Print Invoice**	Produces the Invoice Detail Report for the selected invoice.
Print summary invoice	Click to print summary invoice	**Print Summary Invoice**	Produces the ARS Invoice Summary report for the selected invoice.
Reinstate selected item(s)	Click to reinstate the selected invoice items	**Reinstate Selected Item(s)**	Cancels the selected invoices and returns their lines to Invoice Entry as unapproved lines. Refused for invoices that have payments.
Delete selected item(s)	Click to delete the selected invoice items	**Delete Selected Item(s)**	Removes the selected invoices (invoice, credit memo and counter sale invoices). Refused for invoices that have payments.
Assign Budget	Click to assign a budget to all child records	(none)	Sets one budget on every line of the selected invoices.

View buttons

BUTTON	TOOLTIP	SHOWS
Current	Display current invoices.	Invoices that are not payment complete, not canceled and not deleted
Reinstated	Display reinstated invoices.	Invoices marked Canceled
Deleted	Display deleted invoices.	Invoices marked Deleted

Grid columns

COLUMN	NOTES
(untitled first column)	No heading shown on screen
Customer	
Invoice Number	
Invoice Date	Shown as MM/dd/yyyy

COLUMN	NOTES
Description	
Invoice Total	Shown as currency
Invoice Balance	Amount still owed on the invoice, shown as currency
Received From	
Received By	
Payment Complete	
Payment Type	
Counter Sale Chk #	
Canceled	Set when an invoice is reinstated. Its lines go back to Invoice Entry.
Deleted	
Organization	
Created Date	
Created By	
Last Updated Date	
Updated By	
Notes	
Documents	

Invoice type legend

LEGEND ENTRY
Invoice
Payments
Refunds
Counter sale
Credit

Messages

MESSAGE	WHEN IT APPEARS	WHAT TO DO
`Please select an invoice to print.`	**Print invoice** or **Print summary invoice** with no invoice selected	Select an invoice first.
`Unable to print the current invoice. An email has been sent to support.`	The report came back empty	IRIS10 has notified support. Try again later or contact support.

MESSAGE	WHEN IT APPEARS	WHAT TO DO
`Please select at least one invoice to assign a budget.`	**Assign Budget** with no invoice selected	Select one or more invoices.
`Please select a budget.`	**Assign** clicked without choosing a budget	Choose a budget in **Select Budget:**.
`Budget assigned successfully to all invoice detail records.`	**Assign Budget** succeeded	None.
`Specified … is not active and may not be assigned.`	The chosen budget is inactive	Choose an active budget.
`Please select at least one item to reinstate.`	Reinstate with no invoice selected	Select one or more invoices.
`Are you sure you want to reinstate the selected invoice(s)?`	Reinstate confirmation	Click **Yes** or **No**.
`Could not reinstate records because the following invoices have payments:`	A selected invoice has payments	Remove the listed invoices from your selection.
`Please select at least one item to delete.`	Delete with no invoice selected	Select one or more invoices.
`This action cannot be reversed. Are you sure you want to delete the selected invoice(s)?`	Delete confirmation	Click **Yes** or **No**.
`Could not delete records because the following invoices have payments. Please remove them from your selection and try again:`	A selected invoice has payments	Remove the listed invoices from your selection.

Tips and notes

Important: You can't reinstate or delete an invoice that has payments. Remove or correct the payments first (see Cancelling payments, refunds and credit memos), or leave those invoices out of your selection.

Important: Assign Budget applies to every line of every selected invoice as soon as you click **Assign**. Nothing asks you to confirm, so check your selection first.

Note: Deleting a counter sale invoice also removes its counter sale payment records. Deleting a credit memo also removes its credit payment records if they haven't been applied to a payment.

Tip: Use Reinstate, not Delete, when an issued invoice only needs correcting. Reinstate sends the lines back to Invoice Entry so you can fix them and issue them again.

Note: Clicking **Current**, **Reinstated** or **Deleted** clears any filter already on the grid. Apply your filter again after you switch views. For details, see Grid filters.

Note: The print buttons print one invoice at a time. Select only the invoice you want before you click **Print invoice** or **Print summary invoice**.

Related topics

- Invoice entry: approve and issue
- Cancelling payments, refunds and credit memos
- Receiving payments
- Revenue budgets
- Data grid overview and basics
- Grid filters
- Security Administration: access levels by user

Receiving payments

Overview

Use the Accounts Receivable System screens to record money you receive from customers. Choose the screen that matches the situation:

FORM	USE IT WHEN	WHAT IT CREATES
Invoice Payment (Checks/Credits)	A check or credit is already on file and you want to apply it to open invoices	Payment details against invoice lines; lowers the balances of the check or credit and the invoices, and marks fully paid invoices
Invoice Payment (Enter new check)	A check or cash arrives and you want to apply it to invoices right away	A new payment for the full amount plus payment details for the lines you apply; any unapplied amount stays on the check
Enter Check	You want to record a check now and apply it later	A payment whose balance equals its amount, ready to choose in Checks/Credits; saved at once with no confirmation
Counter Sale	A customer pays at the counter for goods or services that are not yet invoiced	A Counter Sale invoice with its lines, a payment (memo "Counter Sale") and payment details in one step; you can print a receipt

This page also explains how to review a customer's unused payments, credits and amount due on Customer Summary, and how to print an invoice.

Before you begin

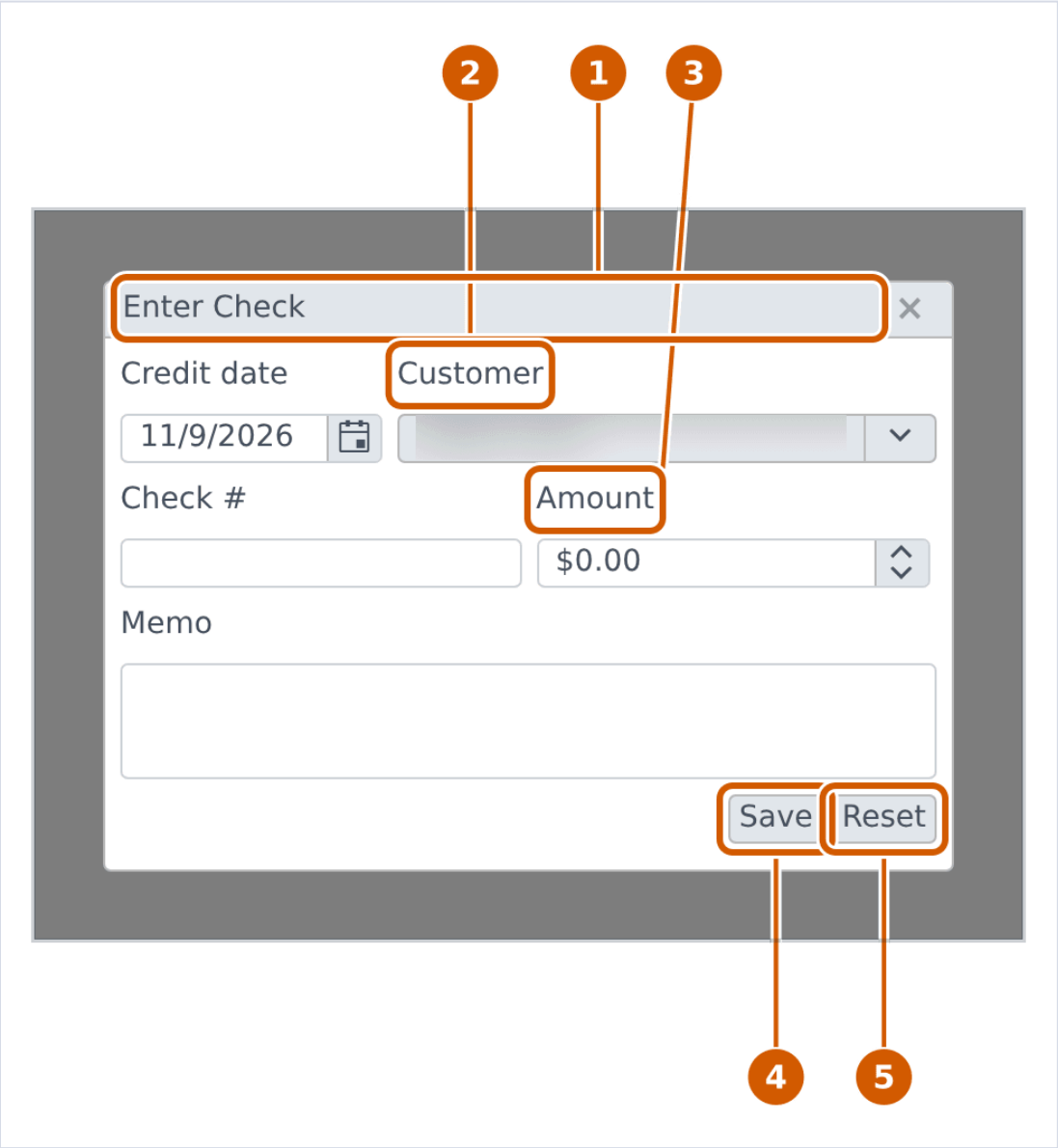
- Sign in to IRIS10 and open the Accounts Receivable System portal. See Navigating portals and pages.
- Make sure the customer's invoices are already issued. See Invoice entry: approve and issue.
- Make sure you have access to the Invoice Payment, Enter Check, Counter Sale or Customer Summary screen you need.
- To print an invoice from Customer Summary, you need access level 4. See Security Administration: access levels by user.

Procedure

Record a check to apply later (Enter Check)

> **Important:** Enter Check saves the check as soon as you click **Save**. There is no confirmation prompt, so check the customer, check number and amount before you save.

1. Open the Enter Check screen (the browser shows `/ars/entercheck`). A window titled "Enter Check" opens, with the fields **Credit date**, **Customer**, **Check #**, **Amount** and **Memo** and the buttons **Save** and **Reset**.



The Enter Check window. Save records the check right away, with no confirmation.

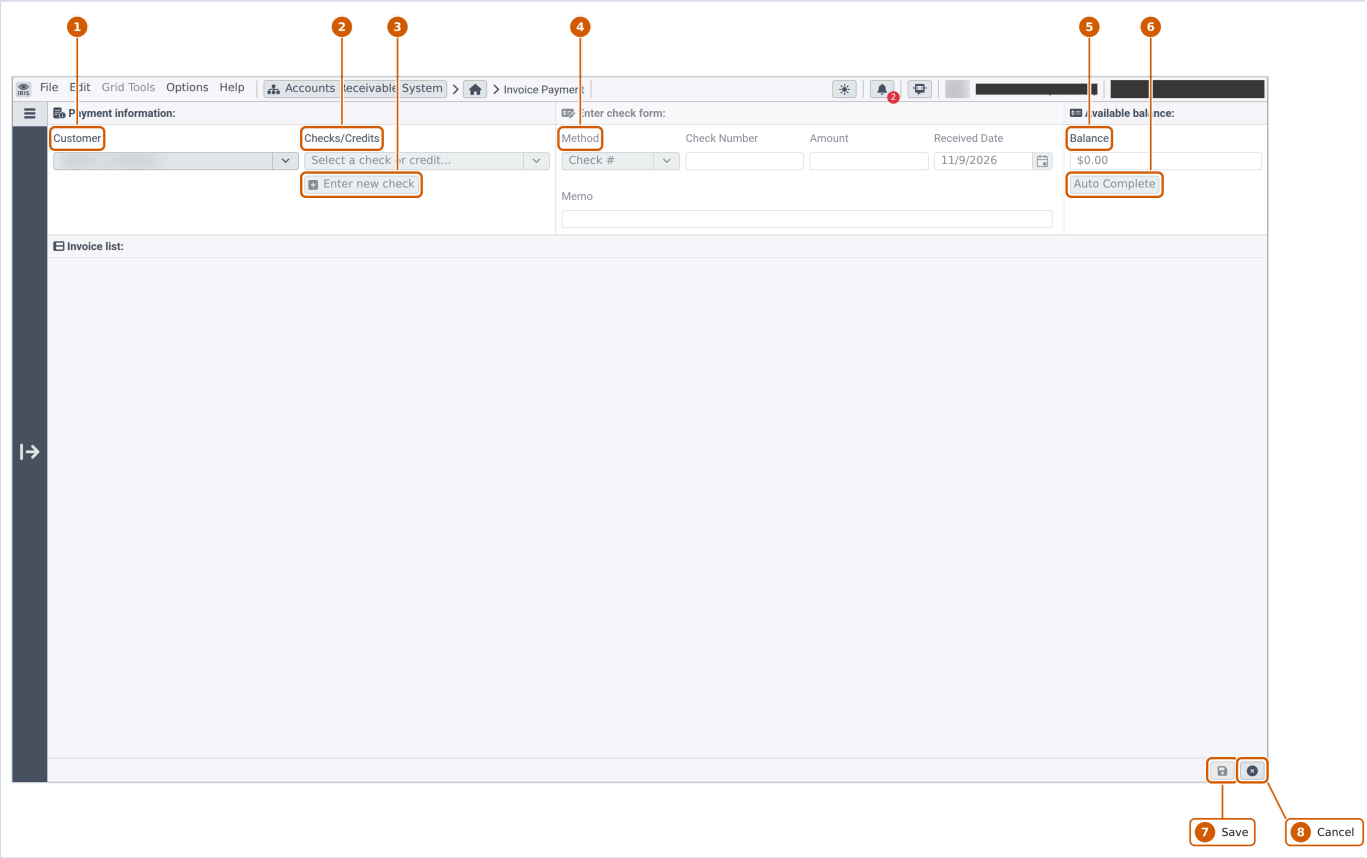
1. Enter Check
2. Customer
3. Amount
4. Save
5. Reset

2. Check **Credit date** and change it if the check arrived on another day. **Credit date** is set to today when the window opens.
3. In **Customer**, select the customer who sent the check. The list includes all customers, sorted by name.

4. In **Check #**, type the check number. A check number is required. It can be up to 15 characters, and the system removes spaces at the start and end.
5. In **Amount**, enter the amount of the check. The amount shows as currency. It starts at 0.
6. If you need to, type a note in **Memo**. **Memo** is a two-line text box that holds up to 512 characters.
7. Click **Save**. The system records the check right away, with no confirmation prompt. The message "The check was successfully entered." appears and the form clears. The check's balance is its full amount, so it is ready to apply on Invoice Payment. If Invoice Payment is open, its **Checks/Credits** list refreshes for the current customer.
8. To start over without saving, click **Reset**. **Credit date** goes back to today, and **Customer**, **Check #** and **Memo** clear. **Amount** goes back to 0.

Apply a check or credit on file to invoices (Invoice Payment)

1. Open the Invoice Payment screen (the browser shows `/ars/invoicepayment`). The screen is headed "Invoice Payment", with panels for Payment information, Enter check form, Available balance and Invoice list. **Enter new check**, **Auto Complete** and **Save** are unavailable.



Invoice Payment before a customer is chosen. Enter new check, Auto Complete and Save stay unavailable until you select a customer.

1. Customer

2. Checks/Credits
3. Enter new check
4. Enter check form
5. Balance
6. Auto Complete
7. Save
8. Cancel

2. In **Customer**, select the customer. Only customers with an outstanding balance are listed. When you select one, **Checks/Credits**, **Enter new check** and **Save** become available. The invoice list loads that customer's invoices that are not fully paid, canceled or deleted.

   > **Note:** To filter the list, type part of the customer name.

3. In **Checks/Credits**, select the check or credit you want to apply. The list shows only this customer's checks and credits that still have a balance above zero, in check-number order. The Enter check form fills in with **Method**, **Check Number**, **Amount**, **Received Date** and **Memo**. **Balance** shows what is left on the check or credit, and the invoice list becomes available.
4. Expand an invoice row to see its lines. A detail grid opens. Its columns are **Payment**, **Balance**, **Contract**, **Date of Service**, **Description**, **Quantity**, **Bill Rate**, **Extended Cost**, **Resource Type**, **Comment**, **Activity** and **Project**.
5. In the **Payment** box of each line you want to pay, type the amount to apply. If you type more than you can apply, the system lowers the amount to the smallest of: what you typed, the line's **Balance**, and what is left of the check or credit after other lines. Lines with a **Balance** of 0 cannot take a payment.
6. Or, instead of typing amounts, click **Auto Complete**. **Auto Complete** is available only while the available balance is above zero. It applies the balance to lines in list order and skips lines that already have a payment or are fully paid. The invoices it changed expand, and the message "Auto complete applied to N invoice(s)." appears.
7. On the toolbar, click **Save** (tooltip "Save the current invoice payment."). The system asks "Are you sure you want to save this invoice payment?" with **Save** and **Cancel** buttons. If the payments add up to more than the check balance, the system blocks the save with "The payments total X, but only Y is available on this check. Reduce the payments and save again."
8. In the prompt, click **Save**. Each amount you applied lowers the check or credit's balance and the invoice's **Balance**. The payment date for each amount is the check's **Received Date**. The system marks an invoice as fully paid when its balance reaches 0. The customer list refreshes and the screen clears for the next payment.

Enter and apply a new check on Invoice Payment

1. Open the Invoice Payment screen. The screen opens as described in the previous procedure.

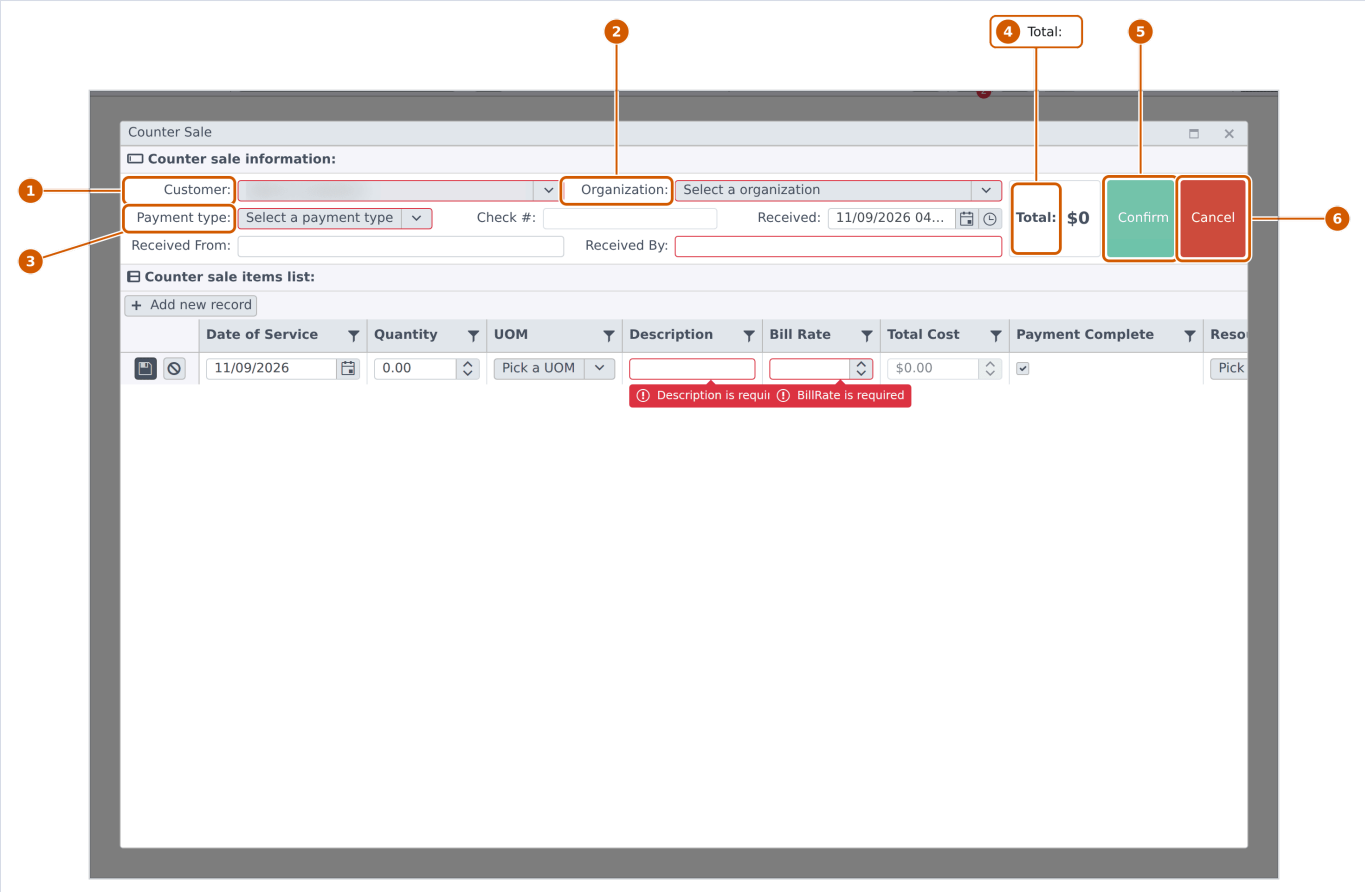
2. In **Customer**, select the customer. **Enter new check** becomes available and the customer's open invoices load.
3. Click **Enter new check**. The button stays pressed. **Checks/Credits** becomes unavailable and clears, and **Balance** shows 0. The Enter check form and the invoice list become available.

   > **Note:** To cancel, click **Enter new check** again. The form clears and becomes unavailable again.

4. In **Method**, select **Check #** or **CASH**. If you choose **CASH**, the system enters "CASH" in **Check Number**.
5. For a check, type the number in **Check Number**. **Check Number** is required and holds up to 15 characters. If you leave it empty, the message "Check number is required." appears. The system refuses the save if this customer already has a check with that number.
6. In **Amount**, enter the amount received. **Amount** is required and shows as currency. If you leave it empty, the message "Check amount is required." appears. **Balance** changes to the amount, and **Auto Complete** becomes available when it is above zero.
7. Check **Received Date** and change it if needed. **Received Date** is set to today. It becomes the payment date of every amount you apply.
8. If you need to, type a note in **Memo**. The system saves the memo with the payment.
9. In the **Payment** boxes, type amounts for the invoice lines you want to pay. Apply at least one line. You cannot pay the same line twice in one payment.
10. Or, instead of typing amounts, click **Auto Complete**. The system applies the balance to the invoice lines in list order.
11. Click **Save** on the toolbar. The system asks "Are you sure you want to save this invoice payment?"
12. In the prompt, click **Save**. The system records the new check for its full amount, and each applied amount lowers the check balance and the invoice balance. The system marks invoices that reach 0 as fully paid. If any amount fails the save checks, the system creates no check. After the save, the screen clears.

Ring up a counter sale

1. Open the Counter Sale screen (the browser shows `/ars/countersale`). A window titled "Counter Sale" opens with the sections "Counter sale information:" and "Counter sale items list:". **Total** shows `$ 0` and **Confirm** is unavailable.



The Counter Sale window: header fields, the items list and the running Total. Confirm stays unavailable until the required fields are complete and no line is being edited.

1. Customer:
2. Organization:
3. Payment type:
4. Total:
5. Confirm
6. Cancel

2. In **Customer:**, select the customer. **Customer:** is required.
3. In **Organization:**, select the organization making the sale. **Organization:** is required.
4. In **Payment type:**, select **Cash**, **Check**, **Credit Card** or **Money Order**. **Payment type:** is required.
5. For **Check**, **Credit Card** or **Money Order**, type the reference number in **Check #:**. **Check #:** stays unavailable until you choose a payment type. It is unavailable for **Cash** and required for **Check**, **Credit Card** and **Money Order**. It holds up to 10 characters. Anything longer shows "Check number must be 10 characters or fewer."
6. Check **Received:** and change the date and time if needed. **Received:** is set to the current date and time. An invalid value shows "Please enter a valid date and time."
7. In **Received From:**, type who paid. **Received From:** holds up to 40 characters.

8. In **Received By:**, type who took the payment. **Received By:** is required and holds up to 3 characters.
9. In the open line-item row, enter **Date of Service**, **Quantity**, **Description** and **Bill Rate**. An empty items list adds a row for you. **Date of Service**, **Quantity** and **Description** are required, and **Description** holds up to 512 characters. **Bill Rate** is required and must be at least 0.01. **Total Cost** is worked out as Quantity × Bill Rate and you cannot edit it. **Payment Complete** is checked by default.
10. If you need to, fill in **UOM**, **Resource Type**, **Activity**, **Project**, **Budget** and **Comments**. These fields are optional.
11. Click **Update** to save the line. The system saves the line and adds a new blank row.
12. To add another line, click **Add new record**. If a row is still being edited, the system asks "You have unsaved changes. Adding a new row will discard these changes. Do you want to continue?"
13. Click **Confirm** (tooltip "Click to complete the counter sale."). **Confirm** is available only when the required header fields are valid and no line is being edited. The system asks "Confirm counter sale." with **Yes** and **No** buttons.
14. Click **Yes**. In one step, the system creates a Counter Sale invoice with its lines, its payment and the payment details. The invoice number is the organization's invoice prefix, then the date as MMDDYY, then the next number in sequence. The payment's memo is "Counter Sale", and its number is the **Check #:** value or, if **Check #:** is blank, the payment type. The system then asks "Would you like to print a receipt."
15. Click **Yes** to print a receipt. The system produces the Invoice Detail Report for the new invoice, and the form clears for the next sale.
16. To skip the receipt, click **No**. The form clears for the next sale.
17. To abandon a sale, click **Cancel** (tooltip "Click to cancel the counter sale."). The system asks "Are you sure you want to cancel the counter sale? The current information will be lost."
18. Confirm the prompt. The Counter Sale window closes.

Review a customer's balance and print an invoice (Customer Summary)

1. Open the Customer Summary screen (the browser shows `/ars/customersummary`). The grid stays empty until you choose a customer. The cards "Unused payment balance:", "Unused credits:" and "Total amount due:" show $0.00.
2. In **Organization**, select the organization. **Customer** becomes available.
3. In **Customer**, select the customer. The cards show this customer's totals for the selected organization, and the grid lists their invoices, payments, refunds, Counter Sales and credits. A card turns green (unused payments or credits) or red (amount due) when it is not zero, and gray when it is zero.
4. Select an invoice row in the grid. **Print invoice** is available for this row if you have access level 4.

5. Click **Print invoice** on the toolbar (tooltip "Click to print invoice"). The system produces the Invoice Detail Report for the selected invoice. If no invoice is selected, the message "Please select an invoice to print." appears.

> **Note: Print invoice** is available only when the selected row is an invoice (not a payment or refund row) and you have access level 4. You can also use **Options** > **Print Invoice** in the main menu.

Reference

How payment amounts are limited

- When you type a payment amount, the system lowers it to the smallest of: what you typed, the line's **Balance**, and what is left of the check or credit after other lines.
- Lines with a **Balance** of 0 cannot take a payment.
- **Auto Complete** is available only while the available balance is above zero. It applies the balance to lines in list order and skips lines that already have a payment or are fully paid.
- **Balance** on Invoice Payment is a read-only box that shows how much of the check or credit is still available to apply.
- If the payments add up to more than the check balance, the system blocks the save.
- When you enter a new check, apply at least one line. You cannot pay the same line twice in one payment.

Invoice Payment fields and buttons

LABEL	BEHAVIOUR
Customer	Only customers with an outstanding balance; type to filter (contains)
Checks/Credits	Unavailable until a customer is chosen; lists the customer's checks and credits with a balance above zero
Enter new check	Toggle button; unavailable until a customer is chosen; opens the Enter check form for a new check
Method	**Check #** or **CASH**; **CASH** puts "CASH" in **Check Number**
Check Number	Required; up to 15 characters
Amount	Required; currency; sets **Balance**
Received Date	Today by default; used as the payment date of each applied amount
Memo	Free-text note
Balance	Read-only; amount still available to apply
Auto Complete	Available only when the available balance is above zero; fills lines in list order
Save	Unavailable until a customer is chosen; asks for confirmation
Cancel	Clears the screen right away, with no confirmation

Invoice list columns

GRID	COLUMNS
Invoice list	Invoice Number, Invoice Date, Invoice Total, Invoice Balance, Updated Date
Invoice lines (expanded row)	Payment, Balance, Contract, Date of Service, Description, Quantity, Bill Rate, Extended Cost, Resource Type, Comment, Activity, Project

Counter Sale fields

LABEL	REQUIRED	NOTES
Customer:	Yes	
Organization:	Yes	
Payment type:	Yes	Cash, Check, Credit Card or Money Order
Check #:	For Check, Credit Card and Money Order	Unavailable for Cash; up to 10 characters
Received:	Yes	Current date and time by default
Received From:	No	Up to 40 characters
Received By:	Yes	Up to 3 characters
Date of Service, **Quantity**, **Description**	Yes	**Description** up to 512 characters
Bill Rate	Yes	At least 0.01
Total Cost	Calculated	Quantity × Bill Rate; cannot be edited
Payment Complete	—	Checked by default
UOM, **Resource Type**, **Activity**, **Project**, **Budget**, **Comments**	No	

Customer Summary cards

CARD	SHOWS
Unused payment balance:	Payment amounts not yet applied (green when not zero)
Unused credits:	Credits not yet applied (green when not zero)
Total amount due:	What the customer owes (red when not zero)

Messages you may see

MESSAGE	WHEN
Are you sure you want to save this invoice payment?	Save on Invoice Payment

MESSAGE	WHEN
The payments total X, but only Y is available on this check. Reduce the payments and save again.	Payments add up to more than the check balance
Auto complete applied to N invoice(s).	After **Auto Complete**
You have unsaved changes. Switching customers will discard them. Do you want to continue?	Changing **Customer** with unsaved amounts
You have unsaved changes. Switching checks will discard them. Do you want to continue?	Changing **Checks/Credits** with unsaved amounts
You have unsaved changes. Leaving this screen will discard them. Do you want to continue?	Leaving Invoice Payment with unsaved amounts
The invoice payment could not be read. Check the Amount, Received Date and payment fields, then save again.	The payment could not be read when saved
Unable to save invoice payment due to a technical error. An email has been sent to support.	Invoice Payment save failed
The check was successfully entered.	Enter Check saved
Confirm counter sale.	**Confirm** on Counter Sale
Would you like to print a receipt.	After a Counter Sale is posted
Unable to post counter sale. An email has been sent to support.	Counter Sale failed
Are you sure you want to cancel the counter sale? The current information will be lost.	**Cancel** on Counter Sale
Please select an invoice to print.	**Print invoice** with no invoice selected

Tips and notes

Important: Enter Check saves the check as soon as you click **Save**. There is no confirmation prompt, so check the customer, check number and amount before you save.

Note: Cancel on the Invoice Payment toolbar clears the screen right away without asking, so you lose any amounts you typed.

Tip: You don't have to apply a whole check at once. Whatever is left stays on the check, and it appears again in **Checks/Credits** for that customer while its balance is above zero.

Note: A customer's check number can be used only once. The system refuses a new check with a number the customer already has.

Note: The Invoice Payment **Customer** list shows only customers who owe money. The Enter Check **Customer** list shows all customers.

> **Tip:** On a Counter Sale, only lines marked **Payment Complete** count as paid. If you clear **Payment Complete** on a line, its amount stays as a balance on the new invoice. The system always saves lines with a negative quantity as payment complete.

> **Note:** Check numbers can be up to 15 characters on Invoice Payment, but only 10 characters on Counter Sale.

Related topics

- Invoice entry: approve and issue
- Issued invoices: print, reinstate, delete and assign budgets
- Cancelling payments, refunds and credit memos
- Navigating portals and pages
- Data grid overview and basics
- Grid viewing and editing
- Grid filters
- Security Administration: access levels by user
- Units of measure, fiscal years and organizations

Cancelling payments, refunds and credit memos

Overview

Use this page to correct a payment in the Accounts Receivable System portal. Choose the correction that fits:

- **Cancel Payment** removes a payment completely and restores the invoice balances it paid. You can cancel any payment.
- **Refund** gives money back from a payment, either its unused balance or amounts on invoice line items.
- **Credit Memo** issues a new credit to a customer.

You can also look up cancelled payments, and the reason given, in the Deleted Payment Log.

Before you begin

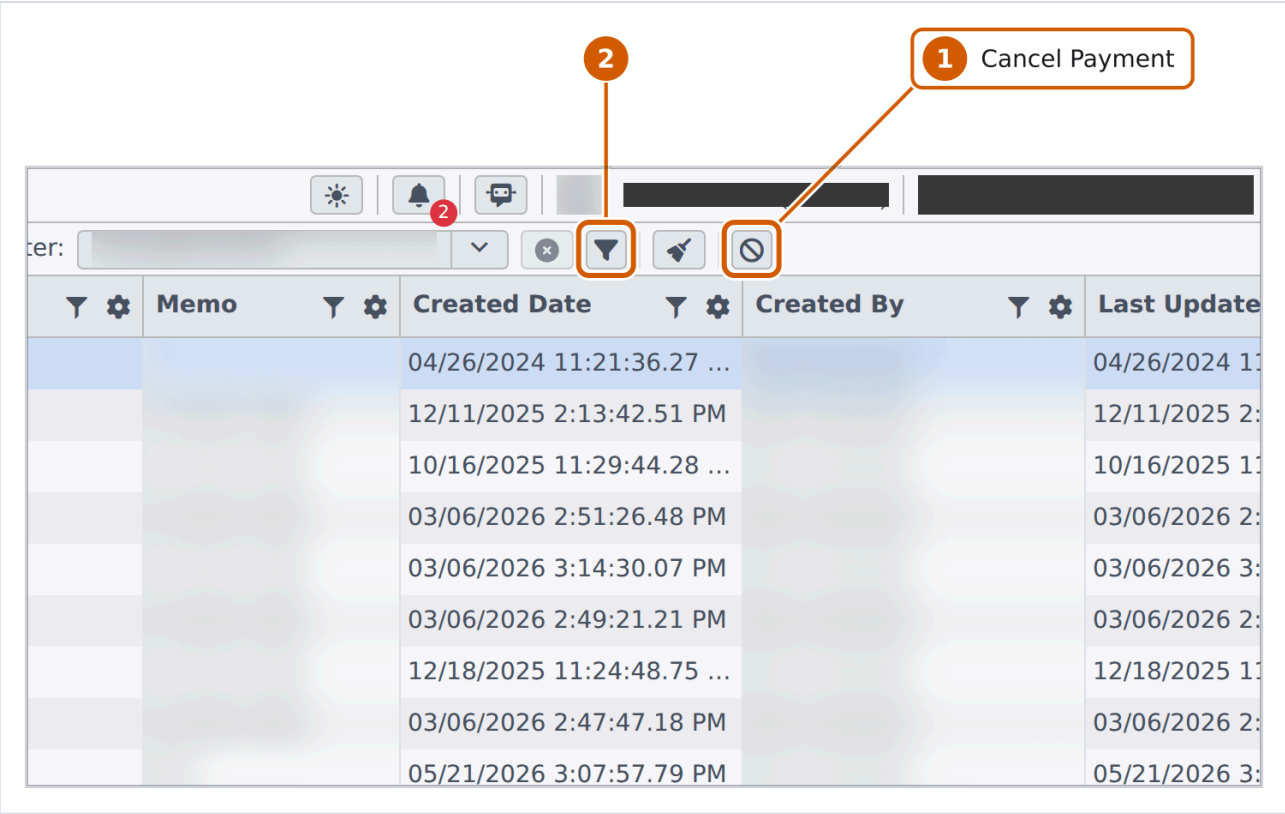
- Sign in to IRIS10 and work in the Accounts Receivable System portal. See Navigating portals and pages.
- Know how to record payments. See Receiving payments.
- Know how to select rows, filter and sort in a grid. See Data grid overview and basics.
- To use **Cancel Payment**, you need an access level that includes the **Cancel Payment** button on Payment History. See Security Administration: access levels by user.

Procedure

Cancel a payment

1. In the Accounts Receivable System portal, open the Payment History screen.

   The Payment History grid opens. Its toolbar includes the **Cancel Payment** button.



Payment History. Select a payment, then use Cancel Payment on the toolbar.

1. **Cancel Payment**: opens the Cancel Payment window for the selected row.
2. **Filter editor**: helps you find the payment. See Grid filters.

2. In the grid, select the row of the payment you want to cancel.

   The row is selected. Select only one payment, because **Submit** cancels only the first selected payment.

3. Click **Cancel Payment** on the toolbar (tooltip "Click to cancel payments."). Alternatively, choose **Options** > **Cancel Payment** from the menu.

   The Cancel Payment window opens and asks "Please enter why you are canceling this Check." If no row is selected, IRIS10 shows "Please select a data row before attempting to cancel a check." and does nothing else.

   > **Note: Cancel Payment** needs security level 4 on Payment History. If you can't use it, ask your administrator about your access level.

4. In the **Cancel check comment** box, type the reason you are cancelling the payment. Always enter a reason.

   The window doesn't check the reason before you submit. If you leave it blank, the cancel fails with "Unable to cancel the check. An email has been sent to support."

5. Click **Submit**.

   There is no second confirmation. IRIS10 cancels the first selected payment straight away. The window closes and the Payment History grid reloads without that payment. The payment, with your reason, now appears in the Deleted Payment Log, and IRIS10 restores

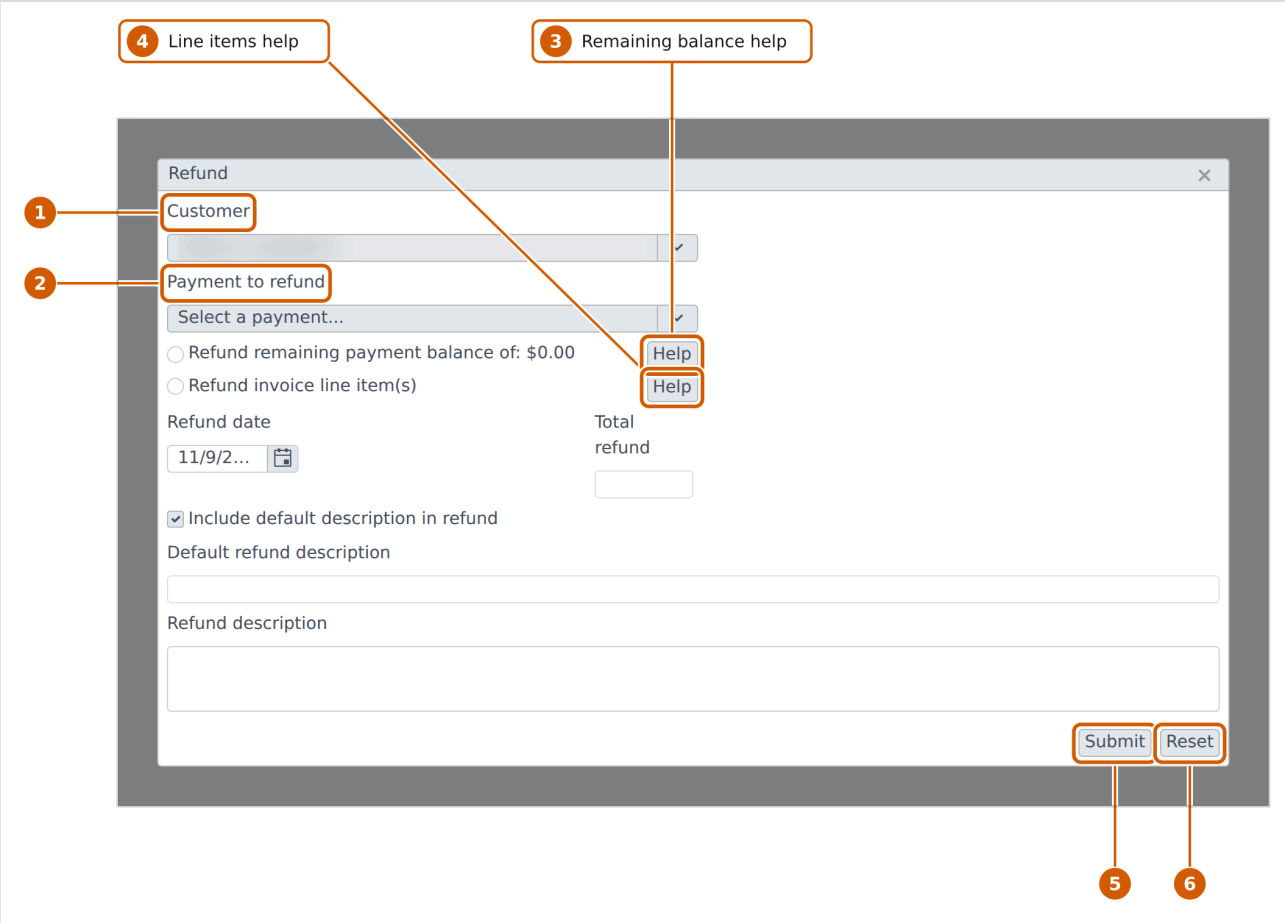
the invoice balances it paid. If the cancel fails, IRIS10 shows "Unable to cancel the check. An email has been sent to support."

For what IRIS10 changes when you cancel a payment, see What Cancel Payment changes.

Refund a payment's remaining balance

1. In the Accounts Receivable System portal, open the Refund page.

   The Refund window opens. **Refund date** shows today's date.



The Refund window. Choose the customer and payment, then the refund option.

   1. **Customer**
   2. **Payment to refund**
   3. **Remaining balance help**
   4. **Line items help**
   5. **Submit**
   6. **Reset**

2. In the **Customer** list, select the customer. You can type part of the name to filter the list.

   The list shows only customers with an outstanding balance. After you pick a customer, the **Payment to refund** list loads that customer's payments.

3. In the **Payment to refund** list, select the payment.

IRIS10 picks the refund option for you. If the payment still has a balance above zero, it selects "Refund remaining payment balance of: <amount>". Otherwise it selects "Refund invoice line item(s)".

4. Make sure "Refund remaining payment balance of: <amount>" is selected.

   IRIS10 hides the line-items grid. **Total refund** shows the payment's remaining balance.
5. Check the **Refund date** and change it if needed.

   IRIS10 requires a refund date.
6. To use the default description, leave **Include default description in refund** checked.

   Default refund description reads "Refunded remaining unused payment balance for Payment <payment>".
7. In **Refund description**, type your own note. This is optional while **Include default description in refund** is checked. If you uncheck that box, you must type a **Refund description**.

   The description can be up to 512 characters.
8. Click **Submit**.

   IRIS10 asks "A <total> REFUND will be issued by this action. Continue?" with **Yes** and **No**. If the payment has no remaining balance, IRIS10 shows "This payment has no remaining balance to refund." instead.
9. Click **Yes** to issue the refund.

   The Refund window closes and IRIS10 shows "Refund complete." The payment's remaining balance is now zero. If there is an error, IRIS10 shows the message and the Refund window stays open so you can fix it.

Refund invoice line items

1. In the Accounts Receivable System portal, open the Refund page.

   The Refund window opens.
2. In the **Customer** list, select the customer.

   The **Payment to refund** list loads that customer's payments.
3. In the **Payment to refund** list, select the payment.

   The payment is selected and IRIS10 picks a refund option.
4. Select "Refund invoice line item(s)".

   The line-items grid appears, with the columns **Invoice No.**, **Item No.**, **Description**, **Line Item Total** and **Refund Amount**.
5. In the **Refund Amount** cell of each line you want to refund, type the amount.

   Refund Amount is the only column you can edit. Each amount must be a number, can't be negative, and can't be more than that line's **Line Item Total**. **Total refund** shows the sum of the amounts you entered.
6. Check the **Refund date** and change it if needed.

   IRIS10 requires a refund date.
7. Set the description as described in Refund descriptions.

The default description reads "Refund applied to invoice line item for payment <payment>".

8. Click **Submit**.

   IRIS10 asks "A <total> REFUND will be issued by this action. Continue?" If no line has an amount, it shows "Enter a refund amount for at least one line item." instead.

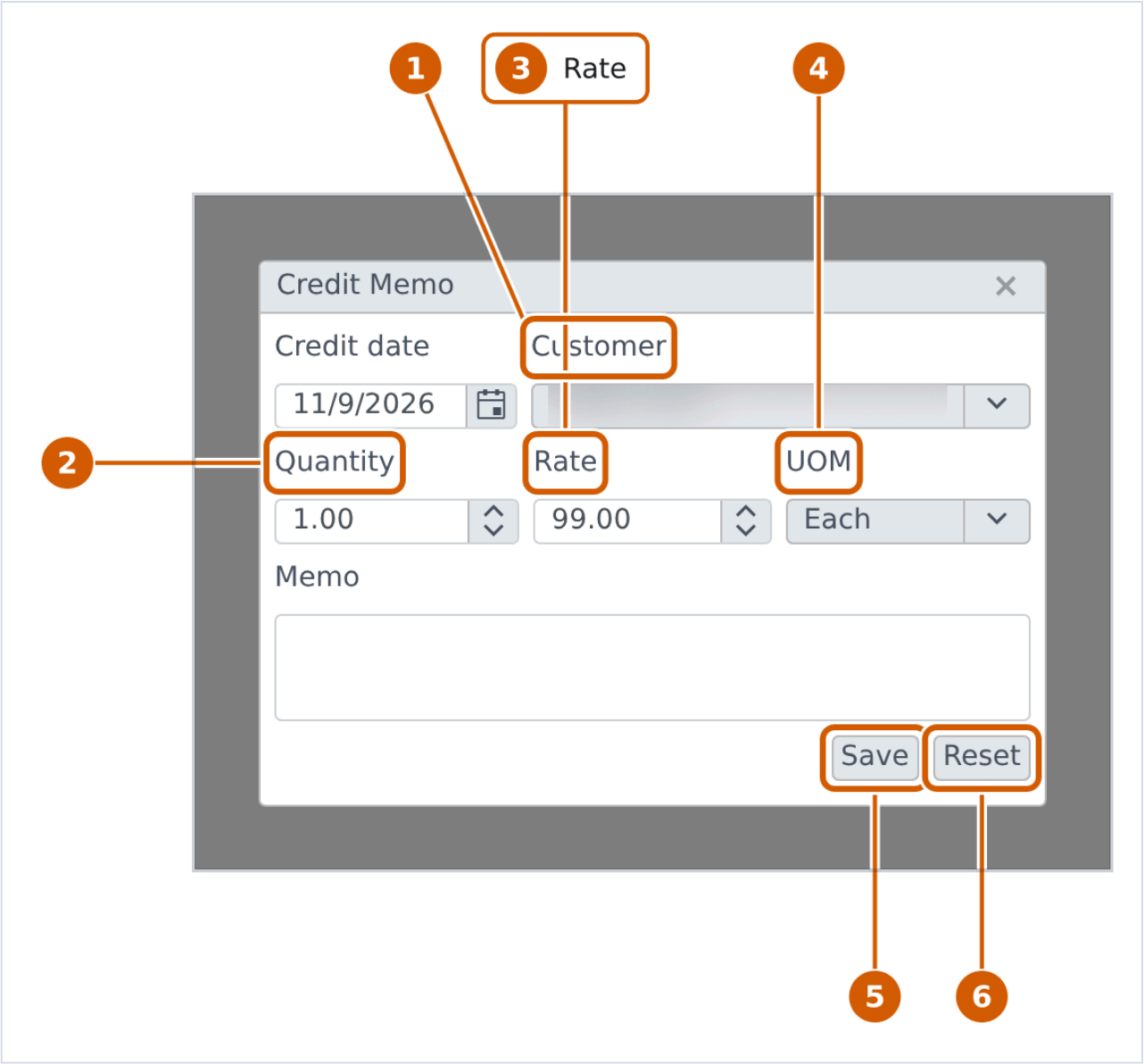
9. Click **Yes** to issue the refund.

   The Refund window closes and IRIS10 shows "Refund complete." If the total is more than the payment amount, or there is another error, IRIS10 shows the message and the window stays open.

Issue a credit memo

1. In the Accounts Receivable System portal, open the Credit Memo page.

   The Credit Memo window opens.



The Credit Memo window. Check every value, especially Rate, before you click Save.

1. **Customer**
2. **Quantity**
3. **Rate**: starts at 99.
4. **UOM**
5. **Save**
6. **Reset**

2. Check the **Credit date** and change it if needed.

   Credit date starts at today's date.
3. In the **Customer** list, select the customer who gets the credit.
4. In **Quantity**, enter the quantity.

   Quantity starts at 1. Type a value or use the increase and decrease arrows.
5. In **Rate**, enter the rate.

Rate starts at 99. Type a value or use the increase and decrease arrows. Always replace the starting **Rate** with the correct rate.

6. In the **UOM** list, select the unit of measure. See Units of measure, fiscal years and organizations.
7. In **Memo**, type a description of the credit.

   The memo becomes the description on the credit memo's line.
8. Click **Save**.

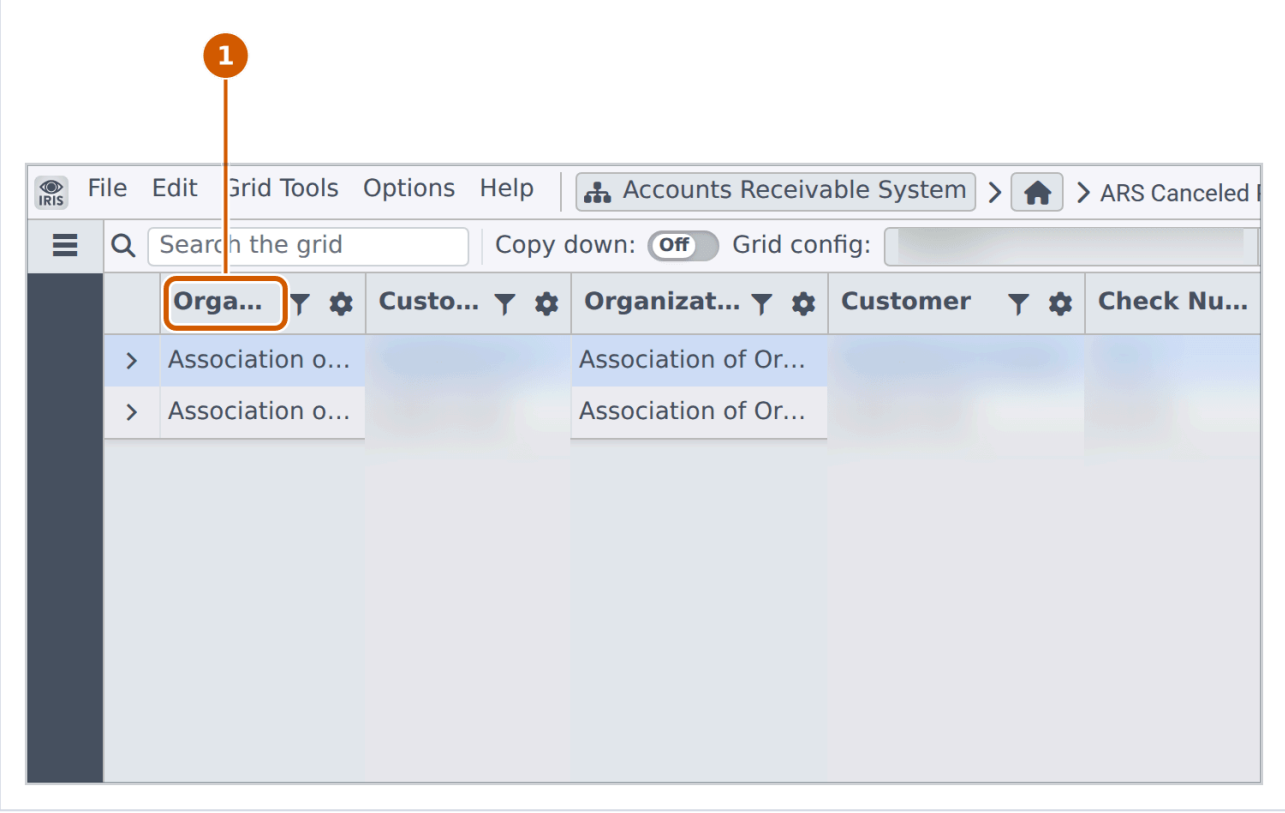
   IRIS10 asks "A $<amount> CREDIT will be issued by this action. Continue?" with **Yes** and **No**.
9. Click **Yes** to issue the credit.

   The Credit Memo window closes and the credit memo opens as a PDF in the Credit Memo Preview window. IRIS10 records the credit for the customer as a payment of Type Credit and creates a matching credit memo invoice. If there is an error, IRIS10 shows the message and the Credit Memo window stays open.

Review cancelled payments in the Deleted Payment Log

1. In the Accounts Receivable System portal, open the Deleted Payment Log screen.

   A read-only grid of cancelled payments opens. You can't add or edit records here.



The Deleted Payment Log lists cancelled payments. The Comment column shows the reason.

1. **Cancelled payment columns**

2. Find the payment by its **Customer**, **Check Number** or **Receive Date**. Use the grid filter if you need to. See Grid filters.
3. Read the **Comment** column to see the reason entered when the payment was cancelled.

   Comment shows the reason, and **Created By** and **Created Date** show who made the change and when.

Reference

Payment History grid columns

COLUMN
Customer
Check Number
Receive Date
Amount
Payment Balance
Type (shows Payment or Credit)
Memo
Created Date
Created By
Last Updated Date
Updated By

What Cancel Payment changes

PAYMENT	WHAT IRIS10 DOES WHEN YOU CANCEL IT
Any payment	Copies the payment and its detail lines to the Deleted Payment Log, with your reason in **Comment**. Reopens the invoice lines the payment paid, adds the paid amounts back to each invoice's balance and marks the invoice as not paid in full. Then removes the payment from Payment History.
Payment of Type Credit (credit memo)	Does all of the above and also removes the credit memo invoice created with the credit.
Payment tied to a counter sale	Does all of the above and also removes the counter-sale invoice.
Refund lines on the payment	Copies them to the log with the description "Refund # <refund number> - <refund description>". They don't change invoice balances, because refunds never affected those balances.

For more on invoices, see Issued invoices: print, reinstate, delete and assign budgets and Invoice entry: approve and issue.

Refund window fields and buttons

FIELD OR BUTTON	WHAT IT DOES
Customer	List of customers with an outstanding balance. Placeholder "Select a customer...". Type to filter. Required.
Payment to refund	List of the selected customer's payments. Placeholder "Select a payment...". Required.
Refund remaining payment balance of: <amount>	Refunds the payment's unused balance. Its Help button opens Refund Remaining Balance Help.
Refund invoice line item(s)	Shows the line-items grid so you can refund individual lines. Its Help button opens Refund Line Items Help.
Refund date	Starts at today's date. Required.
Total refund	Read-only. Shows the Payment Balance (remaining-balance refunds) or the sum of the **Refund Amount** entries (line-item refunds).
Include default description in refund	Checked at first. Uncheck it to leave out the default description.
Default refund description	Read-only text that IRIS10 creates for the refund option you chose.
Refund description	Two-line text box. Required if the default description is left out. Up to 512 characters.
Submit	Checks your entries and asks for confirmation before it issues the refund.
Reset	Clears the customer, payment, description, refund option and line items, sets **Refund date** back to today and checks the default-description box again.

Refund descriptions

REFUND OPTION	DEFAULT REFUND DESCRIPTION
Remaining balance	"Refunded remaining unused payment balance for Payment <payment>"
Invoice line items	"Refund applied to invoice line item for payment <payment>"

If you keep the default description and also type a **Refund description**, IRIS10 joins them as "<default description> - <your description>".

Refund line-items grid columns

COLUMN	EDITABLE
Invoice No.	No
Item No.	No
Description	No
Line Item Total	No
Refund Amount	Yes

Credit Memo window fields and buttons

FIELD OR BUTTON	STARTING VALUE OR BEHAVIOUR
Credit date	Today's date. Required.
Customer	List of customers. Required.
Quantity	1. Required.
Rate	99. Required. Replace it with the correct rate.
UOM	Unit of measure list. Required.
Memo	Two-line text box. Becomes the credit memo's line description.
Save	Asks for confirmation, then issues the credit and opens the Credit Memo Preview.
Reset	Sets **Credit date** back to today, the first customer and UOM, **Quantity** 1, **Rate** 99 and a blank **Memo**.

Deleted Payment Log columns

COLUMN
Organization
Customer
Check Number
Receive Date
Payment Amount
Payment Balance
Payment Type
Memo
Comment (the cancel reason)
Created Date
Created By
Last Updated Date
Updated By

Messages

MESSAGE	WHERE	WHAT TO DO
Please select a data row before attempting to cancel a check.	Payment History, **Cancel Payment**	Select the payment row first.

MESSAGE	WHERE	WHAT TO DO
Unable to cancel the check. An email has been sent to support.	Cancel Payment window	Make sure you entered a reason, then try again. If the message comes back, contact your administrator.
Customer is a required field. / Payment is a required field. / Refund date is a required field.	Refund	Fill in the field named in the message.
This payment has no remaining balance to refund.	Refund (remaining balance)	Use **Refund invoice line item(s)** instead, or choose another payment.
Enter a refund amount for at least one line item.	Refund (line items)	Type a **Refund Amount** on at least one line.
Refund amount for item N cannot be greater than the line item total.	Refund (line items)	Lower that line's **Refund Amount**.
Total refund of <x> is larger than the payment amount: <y>.	Refund (line items), after **Yes**	Lower the line amounts so the total is no more than the payment amount.
Refund complete.	Refund, after **Yes**	None. The refund was issued.

Tips and notes

Important: Cancel Payment acts as soon as you click **Submit**, with no second confirmation. It cancels only the first selected payment, so select one row.

Important: Always type a reason in the Cancel Payment window. The window doesn't check for one, and a blank reason fails with "Unable to cancel the check. An email has been sent to support."

Note: Cancelling a payment of Type Credit also removes its credit memo invoice. Cancelling a payment tied to a counter sale also removes that counter-sale invoice.

Tip: To see what each refund option does, click the Help button next to it.

Note: If you keep the default description and also type a **Refund description**, IRIS10 joins them as "<default description> - <your description>".

Note: Refunds and credit memos are numbered from your organization's invoice numbering: the invoice number prefix and the next invoice number, followed by R for a refund or CM for a credit memo.

Tip: Rate on the Credit Memo window starts at 99. Check **Rate** and **Quantity** before you click **Save**, and read the amount in the confirmation before you click **Yes**.

Note: The Deleted Payment Log is read-only. Use it to see what was cancelled, by whom, and why.

Related topics

- Receiving payments
- Issued invoices: print, reinstate, delete and assign budgets
- Invoice entry: approve and issue
- Data grid overview and basics
- Grid filters
- Navigating portals and pages
- Security Administration: access levels by user
- Units of measure, fiscal years and organizations

Revenue budgets

Overview

A revenue budget has a **Name**, a **Description**, a **Long Name** and an **Organization**. Each revenue budget has budget details per fiscal year. Each budget detail has a budget amount and an **Active** flag.

The **Revenue Budgets** screen is the Accounts Receivable screen that lists revenue budgets and their budget details by fiscal year. You see and change revenue budgets for your own county only.

Use this page to:

- Review revenue budgets and their budget details, including inactive details.
- Add or edit a revenue budget.
- Copy revenue budgets from one fiscal year into another.
- Set every revenue budget detail of a fiscal year to Active or Inactive at once.

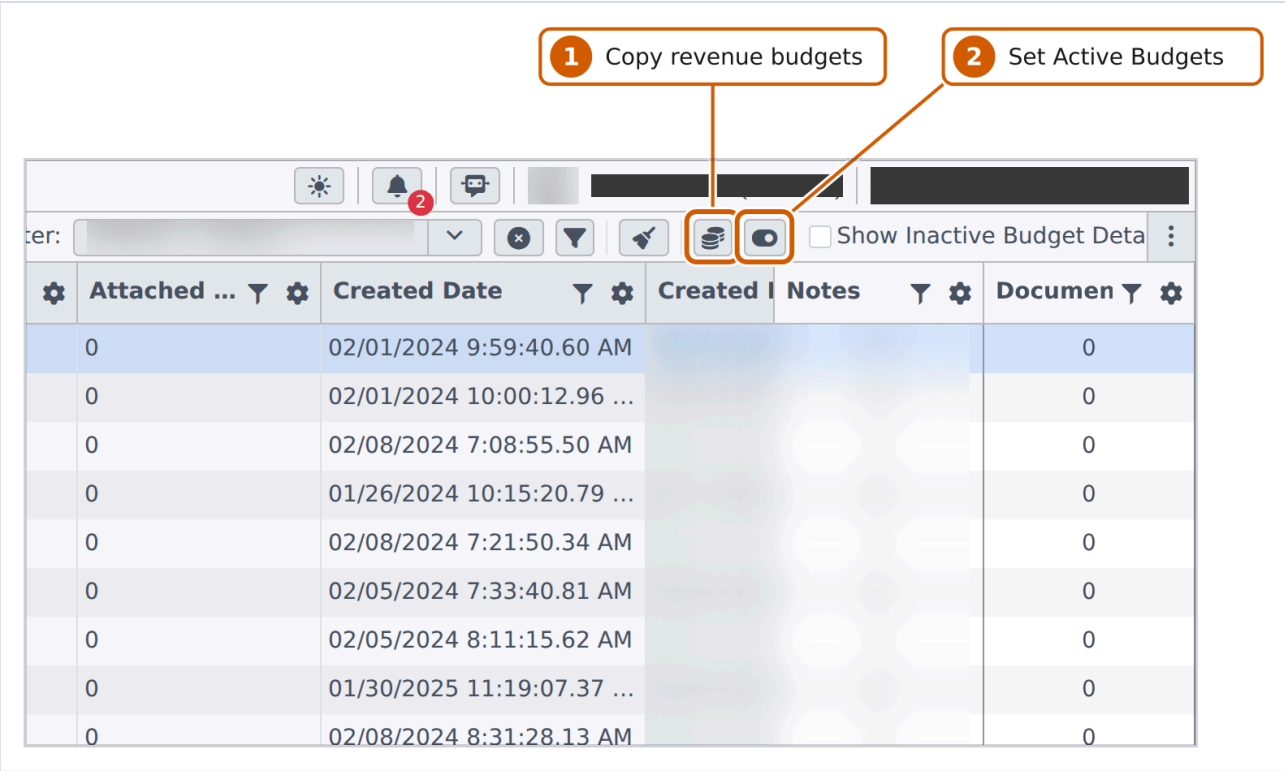
Before you begin

- Sign in to IRIS10.
- Make sure you have access to the **Revenue Budgets** screen in Accounts Receivable.
- Set up fiscal years and organizations. See Units of measure, fiscal years and organizations.
- Know how to use the shared data grid. See Data grid overview and basics.

Procedure

View revenue budgets and show inactive budget details

1. Open the **Revenue Budgets** screen in the Accounts Receivable portal. The **Revenue Budgets** grid opens, with a child grid of budget details for each budget.



The Revenue Budgets screen and its toolbar

1. Copy revenue budgets
2. Set Active Budgets

2. Open a budget's details in the child grid. The budget's details show the fiscal year, the budget amount and the **Active** flag.
3. To include inactive details, select the **Show Inactive Budget Details** checkbox on the toolbar. The setting is saved and the grid reloads. If the change fails, the checkbox goes back to its previous value.

> **Note:** As an alternative to the checkbox, choose **Options** > **Show Inactive Budget Details**. IRIS10 keeps the setting only for your current sign-in session. The setting lasts only until you sign out.

Add or edit a revenue budget

1. In the **Revenue Budgets** grid, use the add tool to add a budget. The **Revenue Budgets** editor opens.

> **Note:** To edit an existing budget, open it with the inline buttons or the pop-out editor instead. The editor opens the same way.

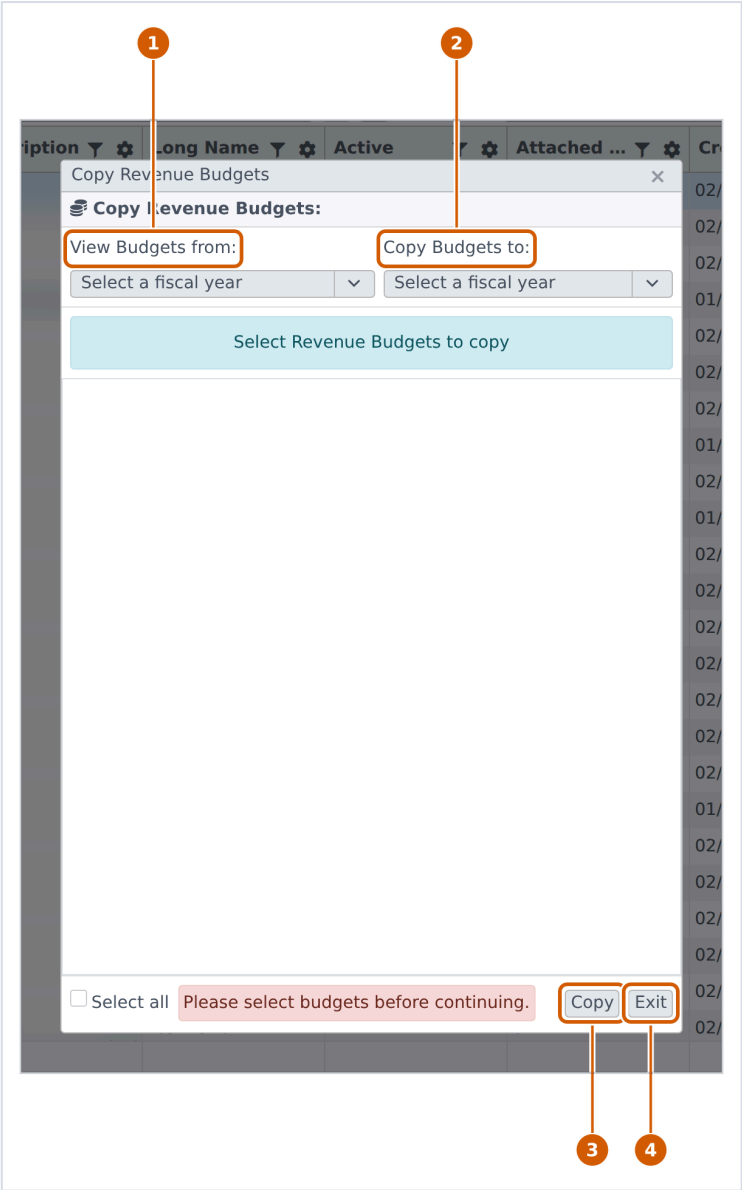
2. Choose the **Organization** from the drop-down.
3. Enter a **Name** of up to 30 characters. If you leave **Name** blank, IRIS10 shows a message that the field is required.
4. Optionally, enter a **Description** and a **Long Name** (up to 50 characters each).

5. Leave **Active** selected for a budget that is in use. Clear it to archive the budget. New budgets are Active by default.
6. Save the record. For saving grid records, see Grid viewing and editing.

Copy revenue budgets to another fiscal year

1. Click the toolbar button whose tooltip is "Click to copy revenue budgets." The **Copy Revenue Budgets** window opens with the header "Copy Revenue Budgets:" and the banner "Select Revenue Budgets to copy". If no fiscal years have budgets, IRIS10 shows "There are no budgets with associated fiscal years to copy." and closes the window.

> **Note:** You can also choose **Options** > **Copy Revenue Budgets**. You see this option only if your access level allows it. If it is missing, ask your administrator.



The Copy Revenue Budgets window

1. View Budgets from:
2. Copy Budgets to:
3. Copy: runs immediately with no confirmation
4. Exit

2. In **View Budgets from:**, choose the fiscal year to copy from. You can type to filter the list. Newest fiscal years appear first. The window then lists that year's budgets in alphabetical order.
3. In **Copy Budgets to:**, choose the fiscal year to copy into.
4. Select the budgets to copy in the list. To select every budget, select **Select all** instead. If you change the selection by hand after using **Select all**, **Select all** is cleared.
5. Click **Copy**. The copy runs right away, with no further confirmation. IRIS10 shows "{n} revenue budgets copied from: {from} to: {to}, successfully." Each copy keeps the source budget amount and is set to Active. Budgets that already exist in the destination year are

skipped. If nothing is copied, IRIS10 shows "No ARS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year".

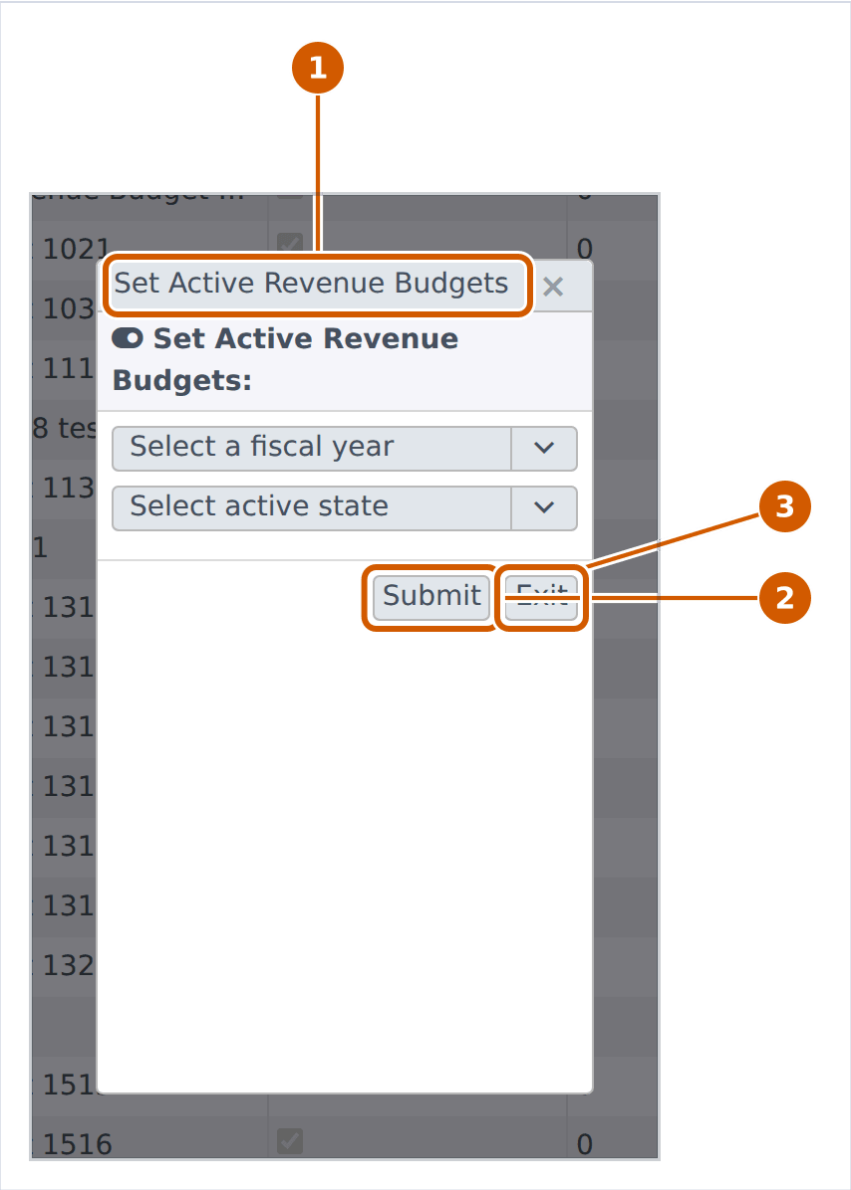
> **Note:** If either fiscal year is missing or no budget is selected, nothing is copied.

6. Click **Exit** to close the window. The window closes. **Exit** makes no changes of its own.

Set every revenue budget detail of a fiscal year to Active or Inactive

1. Click **Set Active Budgets** on the toolbar (tooltip "Click to set active state for revenue budgets by fiscal year."). This option is not on the **Options** menu. The **Set Active Revenue Budgets** window opens. If no fiscal years have budgets, IRIS10 shows "There are no budgets with associated fiscal years." and closes the window.

> **Note:** You see this button only if your access level allows it. If it is missing, ask your administrator.



The Set Active Revenue Budgets window

1. Set Active Revenue Budgets
2. Submit: changes every budget detail of the fiscal year immediately
3. Exit

2. Choose a fiscal year from the "Select a fiscal year" drop-down. A status line shows the current state of that year's budget details. See the Set Active status line table in the Reference section.
3. Choose **Active** or **Inactive** from the "Select active state" drop-down.
4. Click **Submit**. The change applies right away, with no further confirmation, to every revenue budget detail of that fiscal year, whatever is selected or filtered in the grid. IRIS10 shows "Revenue budgets for the selected fiscal year have been set to Active/Inactive successfully." and refreshes the grid and the status line.

> **Note:** If either drop-down is empty, IRIS10 shows "Please select both a fiscal year and an active state." and makes no change.

5. Click **Exit** to close the window. The window closes. **Exit** makes no changes of its own.

Reference

Revenue Budgets grid columns

COLUMN	RULES
Organization	Shown read-only in the grid. In the editor, you choose it from an editable drop-down.
Name	Required. Up to 30 characters.
Description	Optional. Up to 50 characters.
Long Name	Optional. Up to 50 characters.
Active	Selected by default for new budgets.
Attached Documents	Read-only.

Budget detail contents

ITEM	MEANING
Fiscal year	The fiscal year the budget detail applies to.
Budget amount	Defaults to 0. Stored to 4 decimal places.
Active	Shows whether the record is in use (Active) or archived (inactive). Defaults to Active.

Toolbar buttons and Options menu items

WHERE	ITEM	WHAT IT DOES
Toolbar (tooltip "Click to copy revenue budgets.") and **Options** menu > **Copy Revenue Budgets**	Copy Revenue Budgets	Opens the **Copy Revenue Budgets** window.
Toolbar only	Set Active Budgets	Opens the **Set Active Revenue Budgets** window.
Toolbar checkbox and **Options** menu	Show Inactive Budget Details	Includes inactive budget details in the grid for the current sign-in session.

Copy window fields

ITEM	MEANING
View Budgets from:	The fiscal year whose budgets you want to copy.
Copy Budgets to:	The fiscal year that receives the copied budgets.
Select all	Selects every budget in the copy list.

Set Active status line

STATUS SHOWN	MEANING
Currently Active (n records)	All of the year's budget details are active.
Currently Inactive (n records)	All of the year's budget details are inactive.
x Active, y Inactive of n records	The year has a mix of active and inactive details.
No budget details found for this fiscal year	The year has no budget details.

Messages

MESSAGE	WHEN IT APPEARS
{n} revenue budgets copied from: {from} to: {to}, successfully.	The copy finished.
There are no budgets with associated fiscal years to copy.	You opened Copy, but no fiscal years have budgets. The window closes.
No ARS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year	Nothing was copied.
Unable to copy revenue budgets due to a technical error. An email has been sent to support.	The copy failed because of a technical error.
Revenue budgets for the selected fiscal year have been set to Active/Inactive successfully.	Set Active finished.
Please select both a fiscal year and an active state.	You clicked Submit with a drop-down empty.
There are no budgets with associated fiscal years.	You opened Set Active, but no fiscal years have budgets. The window closes.
Unable to set active state for revenue budgets due to a technical error. An email has been sent to support.	Set Active failed because of a technical error.

Tips and notes

Important: Copy and Submit act immediately. IRIS10 does not ask you to confirm. Check both fiscal years and your selection before you click.

Important: Set Active Budgets changes every revenue budget detail of the chosen fiscal year, whatever is selected or filtered in the grid.

Note: Copying copies only the budget amount, and the copies are set to Active. Budgets that already exist in the destination fiscal year are skipped, so no duplicates are created.

Note: IRIS10 remembers **Show Inactive Budget Details** only for your current sign-in session.

> **Note:** You only see and change revenue budgets for your own county.

> **Tip:** Use Inactive for budgets that are archived and Active for budgets that are in use.

Related topics

- Expenditure budgets
- Issued invoices: print, reinstate, delete and assign budgets
- Units of measure, fiscal years and organizations
- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user

Maintenance entries

Overview

The Maintenance Entry screen in Equipment Management holds maintenance and repair work that waits to be posted. A Maintenance Entry is a record of maintenance or repair work on a piece of equipment. Posting moves the entries into equipment maintenance history, records their readings, and updates the PM schedule. See Equipment maintenance history and Reading updates.

On this page you can:

- Record maintenance or repair work on a piece of equipment as a Maintenance Entry.
- Identify which fields are required when you select a Maintenance Policy.
- Use the grid filter to control which entries are posted.
- Post Maintenance Entries and read the messages and notifications that follow.

For general grid use, see Data grid overview and basics.

Before you begin

- Sign in to IRIS10.
- Make sure you have access to the Maintenance Entry screen in Equipment Management.
- To post entries, you need access level 4 on the Maintenance Entry screen. See Security Administration: access levels by user.
- If entries should advance PM schedules, set up preventive maintenance policies and assign them to equipment. See Equipment tools: depreciation, policies and parts.

Procedure

Add a Maintenance Entry

1. Open the Maintenance Entry screen in Equipment Management.

   The Maintenance Entry grid opens, sorted by Equipment.
2. Use the grid's Add tool to open the Maintenance Entry editor (inline or pop-out).

   The Maintenance Entry editor opens with the **Maintenance Entry Info** section.
3. Select the equipment in the **Equipment** dropdown.

   Equipment is required. If you leave it empty, IRIS does not save the entry.
4. If the work is preventive maintenance, select the policy in the **Maintenance Policy** dropdown. Leave it empty for a repair.

   The **Maintenance Method** dropdown is pre-filled with the policy's PM method. An entry with no policy counts as a repair and needs no date or reading.

5. Enter the **Maintenance Date**.

   If a policy is selected and the date is empty, IRIS shows "Maintenance Date is required when a preventive maintenance policy is selected."
6. Enter **Last Reading Hours** or **Last Reading Miles**. The reading that matches the policy's PM method is required.

   If the policy is measured in hours and **Last Reading Hours** is empty, IRIS shows "Reading Hours is required. The selected preventive maintenance policy is measured in hours." The miles version reads "Reading Miles is required. The selected preventive maintenance policy is measured in miles." The rule follows the policy's method, even if you changed the **Maintenance Method** field.
7. Optionally, select an **Employee**.
8. Optionally, select a **Vendor**.
9. Optionally, select a **Repair Type**.
10. Optionally, enter a **Service Description** of up to 256 characters.

    Leading and trailing spaces are removed when the entry is saved.
11. Optionally, fill in any of the user-defined fields, up to 100 characters each. See User defined fields.

    Leading and trailing spaces are removed when the entry is saved.
12. Save the entry as described in Grid viewing and editing.

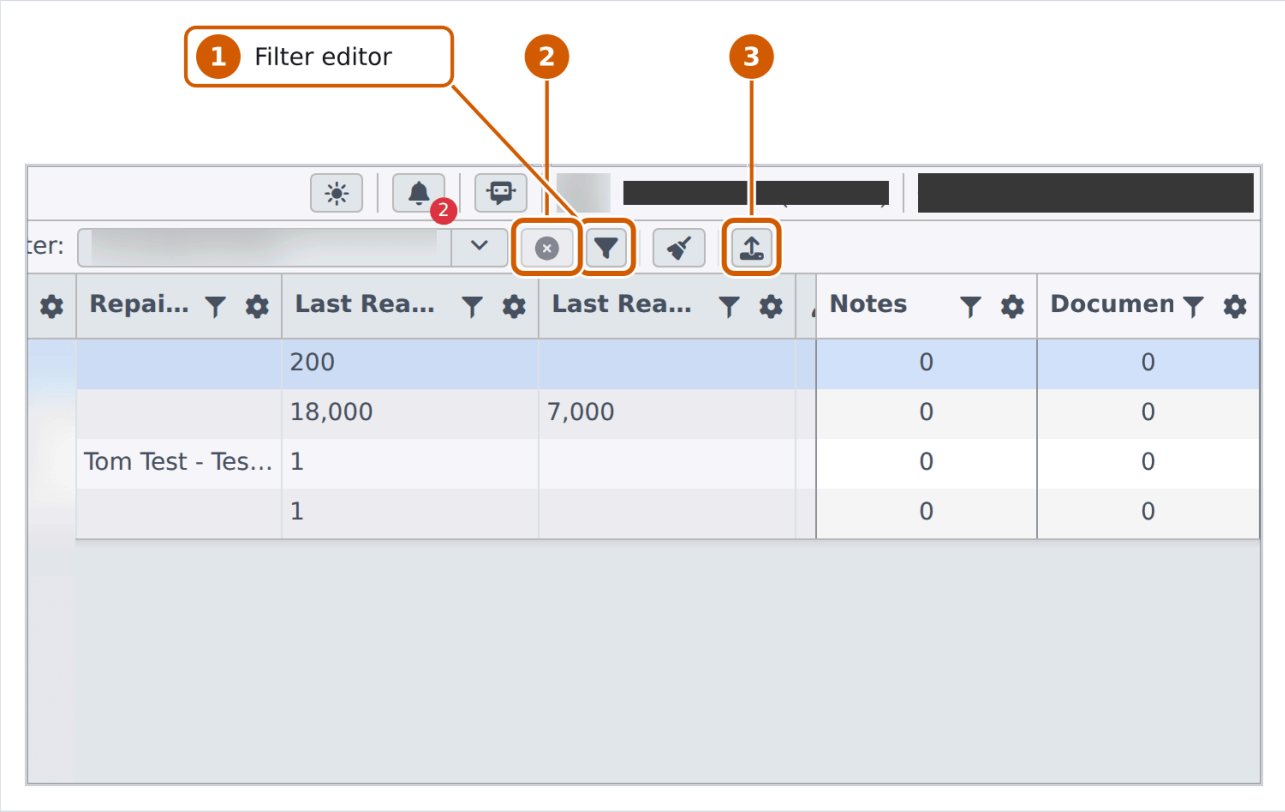
    The entry appears in the Maintenance Entry grid and waits there until it is posted.

Post Maintenance Entries

1. On the Maintenance Entry screen, click **Filter editor** and filter the grid to only the entries you want to post. See Grid filters.

   The grid shows only matching entries. The post covers every entry that matches the current filter, not just the rows you selected. Filtered-out entries are not posted.

   > **Note:** To remove a filter, click **Clear filter**.



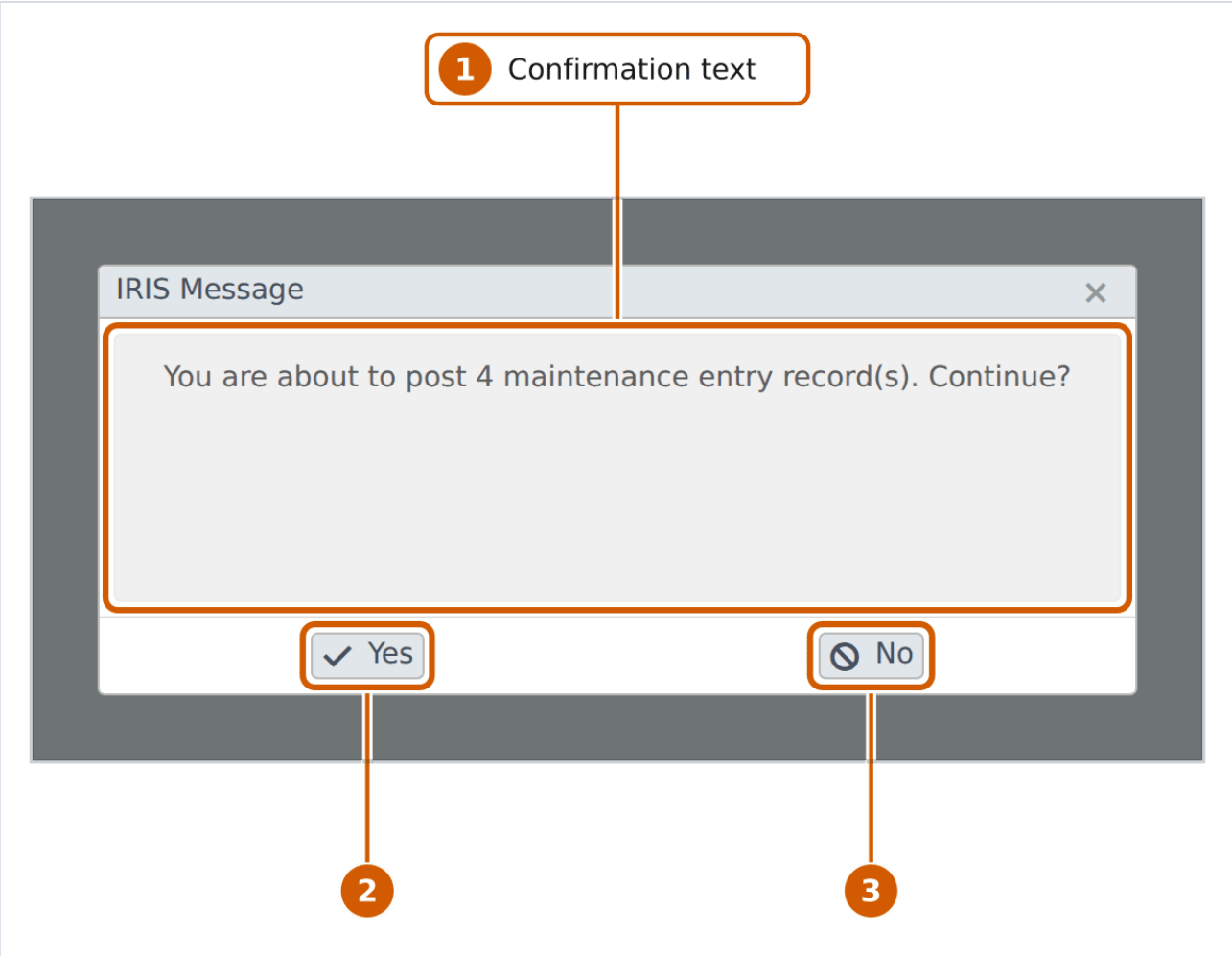
The Maintenance Entry screen. Use Filter editor to choose which entries to post, then Post maintenance entry records.

1. Filter editor — Filter the grid first. The post covers every entry that matches the filter.
2. Clear filter
3. Post maintenance entry records — Requires access level 4.

2. Click **Post maintenance entry records** on the toolbar.

   An IRIS Message window opens and asks "You are about to post N maintenance entry record(s). Continue?" with **Yes** and **No**.

> **Note:** This step requires access level 4 on the Maintenance Entry screen.



The confirmation that opens when you click Post maintenance entry records. The number counts the rows loaded on the current page, not necessarily all entries that will be posted. Click No to cancel.

1. Confirmation text — The count is rows on the current page only.
2. Yes — Posts the entries.
3. No — Cancels without posting.

3. Read the confirmation. N counts the rows loaded on the current grid page, which can be fewer than the number of entries that will be posted.

> **Note:** To cancel, click **No**. The window closes and nothing is posted.

4. Click **Yes** to post.

   A loading window is shown while the post runs.

5. Read the result.

   On success, IRIS shows "EMS maintenance entry records posted successfully." and the grid reloads. Posted entries no longer appear in it. If the post returns errors, the Posting Errors window opens instead of the success message, and the grid then reloads. If validation rejects the post, IRIS shows the validation message. On a technical error, IRIS shows "Unable to post EMS maintenance entry records due to a technical error. An email has been sent to support."

6. Check your notifications for the post result. See Notifications.

   An "EMS maintenance entries posted" notification is sent to you, unless validation rejected the post.

Reference

Maintenance Entry grid columns

COLUMN	NOTES
Equipment	Default sort column. Display only in the grid.
Maintenance Date	Date the work was done.
Employee	Display only in the grid.
Policy	Preventive maintenance policy. Display only in the grid.
PM Method	Display only in the grid.
Vendor	Display only in the grid.
Repair Type	Display only in the grid.
Last Reading Hours	Meter reading in hours.
Last Reading Miles	Meter reading in miles.
User-defined fields	Ten user-defined fields.
Service Description	Up to 256 characters.
Created Date, Created By, Last Updated Date, Updated By	Record audit columns.
Notes, Documents	Attached notes and documents.

PM Method is how a policy is measured: days, hours or miles. The editor shows it as **Maintenance Method**, pre-filled from the policy.

Maintenance Entry toolbar buttons

BUTTON	TOOLTIP
Clear grid configuration	Click to clear grid configuration.
Grid configuration editor	Click to open grid configuration editor.
Clear filter	Click to clear applied grid filter.
Filter editor	Click to open grid filter editor.
Bulk delete mode	Click to enter bulk delete mode.
Post maintenance entry records	Click to post maintenance entry records.

Editor fields and rules (Maintenance Entry Info)

FIELD	TYPE	RULE
Equipment	Dropdown	Always required.
Maintenance Date	Date	Required when a Maintenance Policy is selected.
Employee	Dropdown	Optional.
Maintenance Policy	Dropdown	Optional. Leave empty for a repair. Selecting one pre-fills Maintenance Method.
Maintenance Method	Dropdown	Pre-filled from the policy. If no method is sent, the policy's method is stored.
Vendor	Dropdown	Optional.
Repair Type	Dropdown	Optional.
Last Reading Hours	Number	Required when the policy's PM method is hours.
Last Reading Miles	Number	Required when the policy's PM method is miles.
Service Description	Text	Up to 256 characters. Spaces trimmed.
User-defined fields	Text	Up to 100 characters each. Spaces trimmed.

Messages when saving or editing an entry

MESSAGE	CAUSE	WHAT TO DO
Maintenance Date is required when a preventive maintenance policy is selected.	A policy is selected but no date was entered.	Enter the Maintenance Date or clear the policy.
Reading Hours is required. The selected preventive maintenance policy is measured in hours.	The policy is hours-based and Last Reading Hours is empty.	Enter Last Reading Hours.
Reading Miles is required. The selected preventive maintenance policy is measured in miles.	The policy is miles-based and Last Reading Miles is empty.	Enter Last Reading Miles.
Record has been modified by someone else since being queried from the database, refresh and try your update again.	Someone else changed the entry after you loaded it.	Refresh the grid and make your change again.
Record not found for this tenant.	The entry you are editing no longer exists (for example, it was posted or deleted).	Refresh the grid.

What posting changes

AREA	EFFECT
Equipment maintenance history (EMS History)	Each posted entry is copied into history with its equipment, date, employee, vendor, readings, repair type, policy, service description and user-defined fields. If the entry has no PM method, the history row uses the policy's method.

AREA	EFFECT
Reading history	An entry with an hours or miles reading adds a reading-history row with source "Maintenance Entry", dated with the Maintenance Date. An entry with no reading adds none.
Equipment last readings	Each equipment record's last reading date, hours and miles are refreshed from its most recent reading-history row that has hours or miles.
PM schedule	For the equipment and policy of each posted entry, Last PM, Next PM Due and last maintenance date are updated, but only where the policy is assigned to that equipment. Entries with no Maintenance Date are skipped. Hours and miles policies also need the matching reading.
PM schedule: days policy	Last PM is the Maintenance Date and Next PM Due is that date plus the policy's PM frequency.
PM schedule: hours or miles policy	Last PM is the reading (Last Reading Hours or Last Reading Miles) and Next PM Due is the reading plus the policy's PM frequency.
Several entries for one equipment and policy	The entry with the latest Maintenance Date sets the schedule.
Maintenance Entry grid	Posted entries are removed.
Cost Accounting	No Cost Accounting transactions are created.

Next PM Due is when the next preventive maintenance is due: the last PM date or reading plus the policy's PM frequency. Posting sets it.

Messages after posting

SITUATION	WHAT YOU SEE
Success	"EMS maintenance entry records posted successfully." The grid reloads.
Errors returned for records	The Posting Errors window opens instead of the success message. The grid reloads afterward.
Rejected by validation	The validation message is shown.
Technical error	"Unable to post EMS maintenance entry records due to a technical error. An email has been sent to support."

Post notifications

RESULT	NOTIFICATION TITLE	NOTIFICATION TEXT
Success	EMS maintenance entries posted	EMS maintenance entry post finished with no errors.
Partial success	EMS maintenance entry post finished with errors	… finished, but one or more records returned errors. The errors were listed on the screen when it finished.
Failure	EMS maintenance entry post failed	… did not finish. Try again or contact support.

RESULT	NOTIFICATION TITLE	NOTIFICATION TEXT
Contact with the server lost	EMS maintenance entry post result unknown	IRIS lost contact with the server before this finished. It may still have completed. Check the records before you run it again.
Rejected by validation	None	No notification is sent.

Tips and notes

Important: Posting covers every entry that matches the grid's current filter, not only the rows you selected. Filter the grid before you click **Post maintenance entry records**.

Important: The number in the confirmation counts the rows loaded on the current grid page. More entries can be posted than this number shows.

Note: Posted entries are removed from the Maintenance Entry grid and kept in equipment maintenance history. Look them up there after posting.

Note: Posting updates the PM schedule only where the entry's Maintenance Policy is assigned to that equipment. Entries with no Maintenance Date do not change the schedule.

Tip: The required reading follows the policy's PM method. Changing the **Maintenance Method** field does not change which reading is required.

Tip: If a notification says IRIS lost contact with the server, the post may still have finished. Check the grid and maintenance history before you post again.

Note: Turn post notifications on or off in notification settings under EMS > Post Maintenance Entries ("Notifications when a post you run finishes.").

Note: The main menu also has Options > Post Maintenance Entry Record(s). This page uses the toolbar button.

Note: Posting does not create Cost Accounting transactions.

Related topics

- Grid filters
- Notifications
- Equipment maintenance history
- Reading updates
- Equipment tools: depreciation, policies and parts
- Grid viewing and editing

- Data grid overview and basics
- User defined fields
- Security Administration: access levels by user

Work orders

Overview

A work order records maintenance on one piece of equipment. It holds detail lines for labor, equipment, parts and outside services. When the work is done, you post the work order to maintenance history.

This page covers how to:

- Create a work order and add detail lines to it.
- Identify the required and read-only fields and their limits.
- Post work orders so their detail lines move into equipment maintenance history, readings and PM schedules are updated, and completed work orders are closed.
- Control which work orders a post affects by using the grid filter.
- Maintain the tasks that detail lines use.

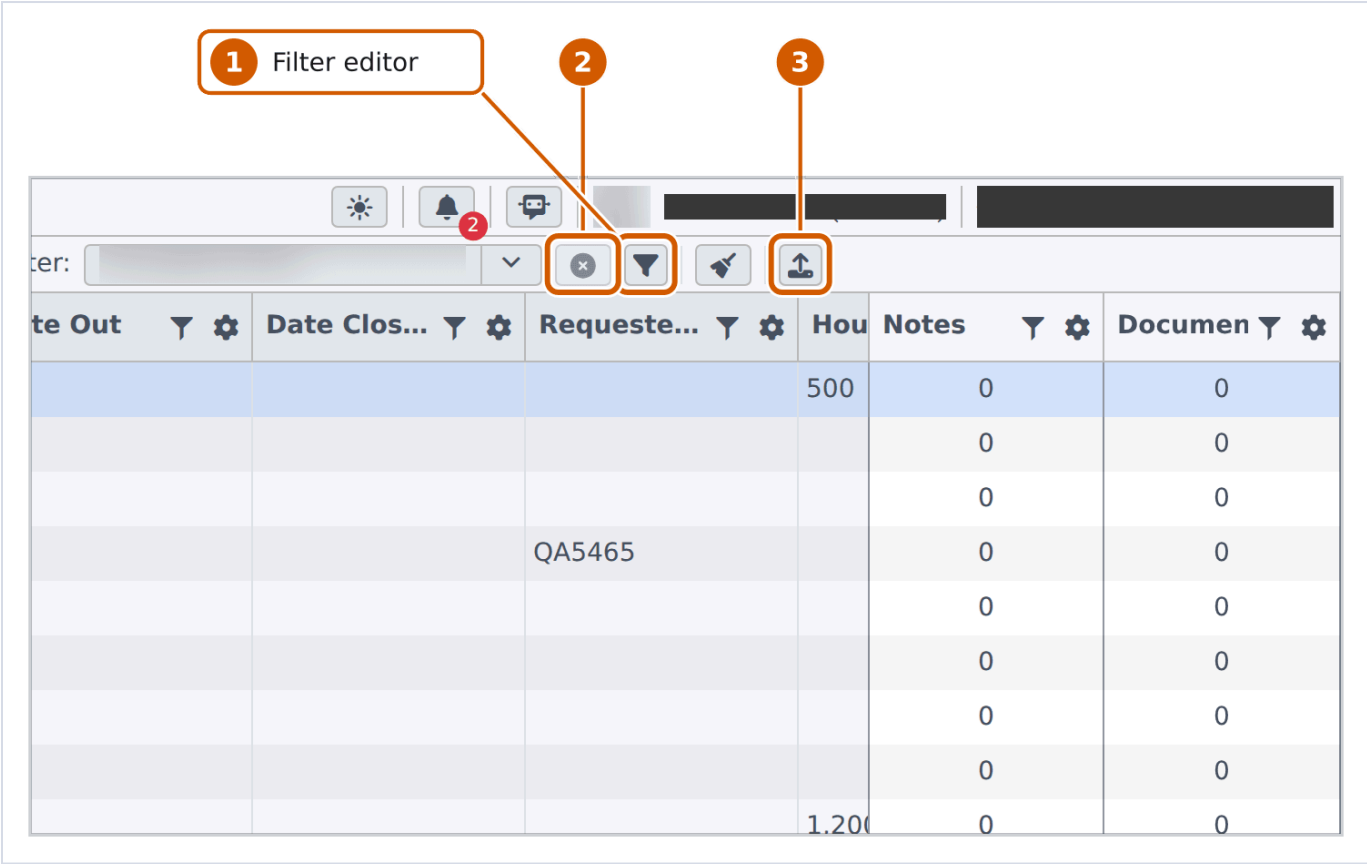
Before you begin

- Sign in to IRIS10 and open the Work Order screen. See Navigating portals and pages.
- Make sure you have access to the Work Order screen. Posting needs access level 4 on that screen. See Security Administration: access levels by user.
- Know how to add, edit and filter records in the shared data grid. See Grid viewing and editing, Grid filters and Data grid overview and basics.
- Set up tasks on the EMS Task screen. See Add a task.
- Assign PM policies to equipment if posting should advance PM schedules. See Equipment tools: depreciation, policies and parts.

Procedure

The Work Order screen

The Work Order grid shows columns such as Equipment, Status, Work Order Number, Location, Date In, Date Out and Date Closed. Each work order row has a child Work Order Detail grid. The toolbar includes **Filter editor**, **Clear filter** and **Post work order(s)**.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7. Click **OK** on the message. The work order row expands and a new row opens in its Work Order Detail grid. This does not happen if you are using save-and-add-new, or if the new work order is on a different grid page.

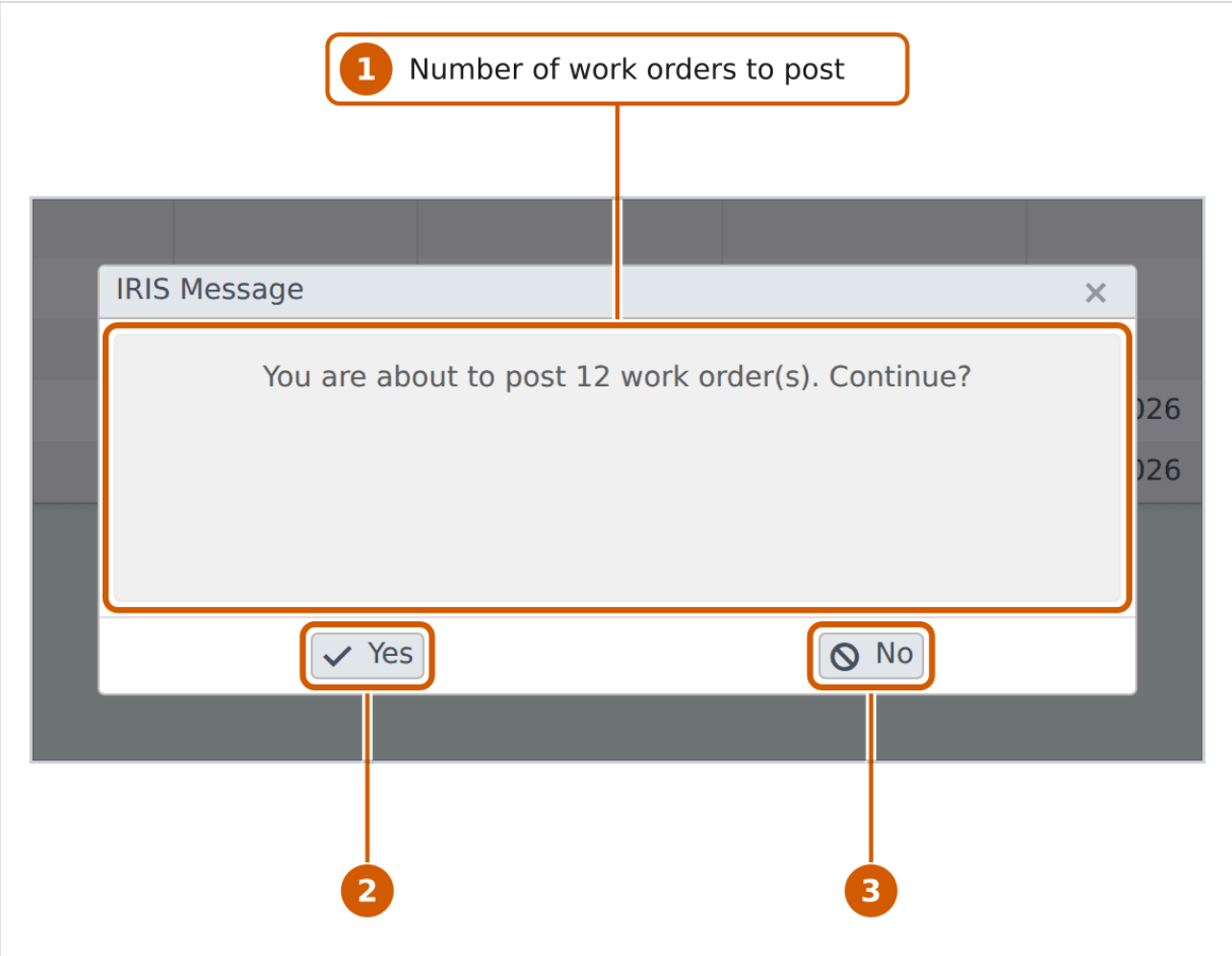
Add work order detail lines

1. Expand the work order row to show its Work Order Detail grid, then add a detail line. The Work Order Detail editor opens with the Work Order Detail Info section.
2. Select the **Task**. Task is required on every detail line.
3. Enter the **Task Date** and **Employee**.
4. Select a **Policy** if the work satisfies a PM policy. When the line is posted, a policy on the line can advance the equipment's PM schedule.
5. Enter costs and quantities as needed: **Labor Quantity** and **Labor Unit Cost**; **Equipment**, **Equipment Quantity** and **Equipment Unit Cost**; **Part**, **Part Quantity**, **Part Description**, **Part Cost** and **Part UOM**; **Outside Service Quantity**, **Description** and **Cost**. Cost fields accept values from 0 to 999999999999999.
6. Enter a **Service Description**, and set **Complete** and **PM Method** if you use them.
7. Leave **Posted To Maintenance History** cleared for a new line. Posting picks up only the lines where this checkbox is cleared, and checks it when it posts them.
8. Save the detail line.
9. Repeat for each further task, part or service on the work order.

Post work orders

1. On the Work Order screen, click **Filter editor** and filter the grid so that it shows only the work orders you want to post. The grid lists only the matching work orders. Posting uses this filter and any search filter, across all pages, not the rows you have selected.
2. Click **Post work order(s)** on the toolbar (tooltip "Click to post work order records."). An IRIS Message window asks "You are about to post N work order(s). Continue?", where N is every work order in the current filtered result.

> **Note:** Posting requires access level 4 on the Work Order screen.



The posting confirmation shows how many work orders in the current filter will be posted. Click No to cancel.

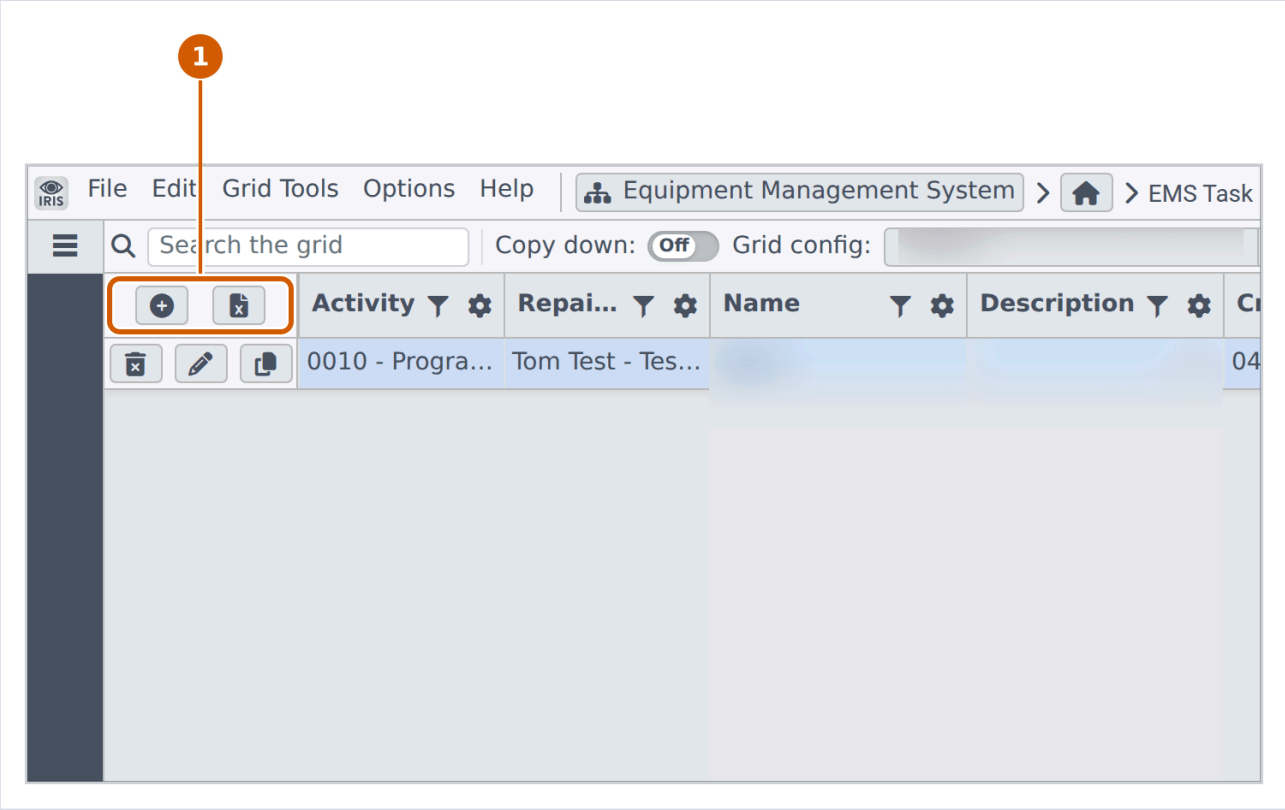
1. Number of work orders to post
2. Yes posts
3. No cancels

3. Check that the number in the message matches the number of work orders you mean to post.
4. If the number does not match, click **No**, then change the filter. **No** closes the message without posting anything.
5. If the number matches, click **Yes**. A loading indicator shows while posting runs. When it finishes, "Work orders posted successfully." appears and the work order grid reloads. If the server reports validation errors, they are shown in a message instead.
6. Review the results: posted detail lines have **Posted To Maintenance History** checked, and work orders with no unposted lines left show **Status** Closed and today's **Date Closed**. The posted work is now in the equipment's maintenance history. See Equipment maintenance history.

> **Important: Post work order(s)** posts every work order that matches the grid's current filter, across all pages, not just the rows you selected. Set the filter first and check the count in the confirmation before you click **Yes**.

Add a task

1. Open the EMS Task screen. A grid lists tasks with Activity, Repair Type, Name and Description columns.



The EMS Task screen lists the tasks used on work order detail lines.

    1. Task columns
2. Add a new record using the grid's add function. The Task editor opens with the Task Info section.
3. Select a **Repair Type**. Repair Type is required.
4. Enter a **Name** of up to 30 characters. Name is required.
5. Optionally select an **Activity** and enter a **Description** of up to 128 characters.
6. Save the task. The task is now available on work order detail lines.

Reference

Work Order toolbar

BUTTON	TOOLTIP	USE
Clear grid configuration	Click to clear grid configuration.	Reset the grid layout (disabled when nothing is saved).
Grid configuration editor	Click to open grid configuration editor.	Save or choose a grid layout.
Clear filter	Click to clear applied grid filter.	Remove the applied filter (disabled when no filter is applied).
Filter editor	Click to open grid filter editor.	Build the filter that also sets which work orders a post includes.
Bulk delete mode	Click to enter bulk delete mode.	Delete several records at once.
Post work order(s)	Click to post work order records.	Post every work order in the current filtered result (requires access level 4).

Work order fields

FIELD	NOTES
Equipment	Required.
Status	Posting sets it to Closed when no unposted detail lines remain.
Work Order Number	Read-only; generated on save (placeholder `Generated on save`); up to 20 characters.
Location, Date In, Date Out, Requested By, Description	Optional work order details. Description is copied to history on posting.
Date Closed	Set to the posting date when posting closes the work order.
Hours At Service, Miles At Service	Copied to history on posting; if either is entered, posting adds a reading-history row.
User-defined fields	Copied to each history row on posting.
Posted To Maintenance History	Read-only on the work order; set by posting.

Work Order Detail fields

FIELD	REQUIRED	LIMITS AND NOTES
Task	Yes	Chosen from the EMS Task list.
Policy	No	On posting, advances the PM schedule if that policy is assigned to the equipment.
Employee, Task Date	No	Task Date becomes the maintenance date in history.

FIELD	REQUIRED	LIMITS AND NOTES
Labor Quantity, Labor Unit Cost	No	Cost 0 to 999999999999999.
Equipment, Equipment Quantity, Equipment Unit Cost	No	Cost 0 to 999999999999999.
Part, Part Quantity, Part Description, Part Cost, Part UOM	No	Part Description up to 100 characters; cost 0 to 999999999999999.
Outside Service Quantity, Description, Cost	No	Description up to 100 characters; cost 0 to 999999999999999.
Service Description	No	Up to 256 characters; copied to history.
Complete	No	Checkbox.
PM Method	No	Copied to history only; does not drive the PM schedule.
Posted To Maintenance History	Yes (checkbox)	Editable checkbox; posting checks it. Only lines where it is cleared are posted.

What posting changes

Posting moves every unposted detail line of each work order into maintenance history, records readings, updates the equipment's last readings and PM schedule, and marks the lines posted. A work order is set to Closed only when none of its lines remain unposted.

AREA	CHANGE
Maintenance history	Each unposted detail line becomes a history row marked as posted from a work order, with the work order's hours and miles at service, the line's task date, employee, policy and PM method, the task's repair type, the work order description, the line's service description and the user-defined fields.
Reading history	One reading row per work order, with source Work Order and dated the latest task date of its unposted lines, but only if Hours At Service or Miles At Service is entered.
Equipment last readings	Last reading date, hours and miles are updated from the equipment's most recent reading-history row.
PM schedule	For each line with a policy that is assigned to that equipment: Last PM is set using the policy's PM method (days: line's task date; hours: work order's hours; miles: work order's miles), Next PM Due = Last PM + the policy's PM frequency, and the last maintenance date is set to the most recent task date.
Detail lines	Posted To Maintenance History is checked.
Work order	When no unposted lines remain: Status is Closed, Date Closed is today, and Posted To Maintenance History is set.
Notifications	An EMS work order post notification is sent.
Cost Accounting	No transactions are created.

See Reading updates and Notifications.

EMS Task fields

FIELD	REQUIRED	LIMITS
Activity	No	
Repair Type	Yes	Copied to history when lines using this task are posted.
Name	Yes	Up to 30 characters.
Description	No	Up to 128 characters.

Messages

MESSAGE	WHEN	WHAT TO DO
The work order was saved. Please add the first work order detail record.	After saving a new work order.	Click **OK** and enter the first detail line.
You are about to post N work order(s). Continue?	After clicking **Post work order(s)**.	Check N. Click **Yes** to post or **No** to cancel.
Work orders posted successfully.	Posting finished.	Review the closed work orders and the history.
Unable to post EMS work order records due to a technical error. An email has been sent to support.	Posting failed with a technical error.	Contact your administrator before you try again.
No valid record keys provided.	Posting was started with no work orders to post.	Change the filter so that it includes work orders, then post again.
One or more work order keys not found for this tenant.	A work order in the post could not be found; nothing was posted.	Refresh the grid and post again.
Record has been modified by someone else since being queried from the database, refresh and try your update again.	Saving a detail line or task that another user changed after you loaded it.	Refresh the grid and make your change again.
Record List contains System Data which cannot be deleted.	Deleting system detail lines or tasks.	These records cannot be deleted.

Tips and notes

> **Note:** The PM schedule is advanced using the policy's PM method and PM frequency, not the PM Method on the detail line. The line's PM Method is only copied to history. Schedules change only where the policy is assigned to that equipment.

> **Tip:** Enter **Hours At Service** or **Miles At Service** on the work order if you want posting to record a meter reading for the equipment.

> **Note:** Posting creates no Cost Accounting transactions.

Note: The Options menu also has a **Post Work Order Record(s)** entry, but post from the **Post work order(s)** toolbar button.

Note: When you delete detail lines or tasks, their comments and documents are deleted too. A copy of each deleted record is kept in audit history.

Note: The EMS Task screen is a plain list of tasks. It has no post action.

Related topics

- Grid viewing and editing
- Grid filters
- Data grid overview and basics
- Equipment maintenance history
- Reading updates
- Maintenance entries
- Equipment tools: depreciation, policies and parts
- Notifications
- Security Administration: access levels by user
- User defined fields
- Navigating portals and pages

Reading updates

Overview

You enter new hour and mile readings for equipment on the EMS Reading Update screen, and then you post them. Posting adds the readings to Reading History, updates the equipment's last readings and removes the posted Reading Updates from the update list.

The EMS Reading Update Posting Errors window lists the readings that the system rejects. You can download that list. You can also correct an existing reading in Reading History.

Before you begin

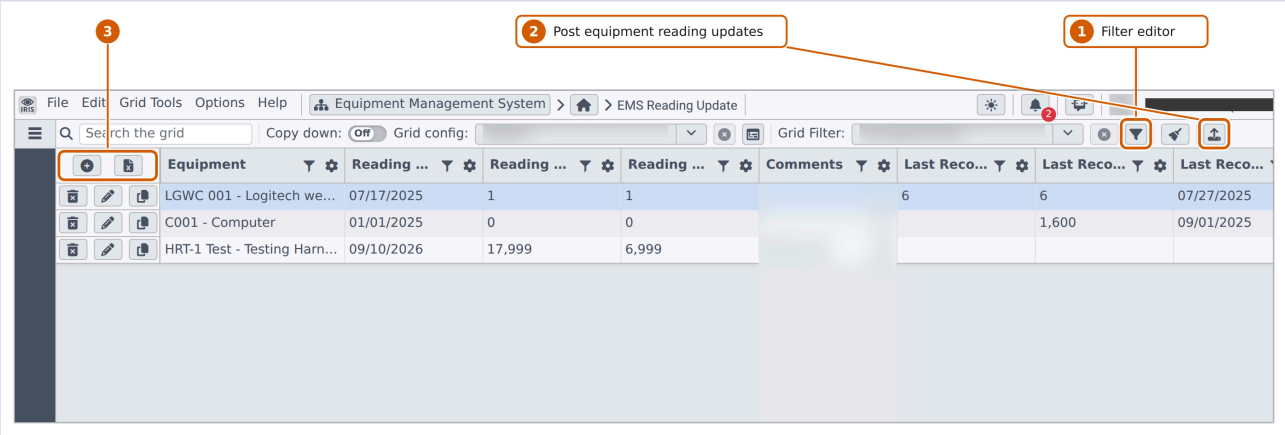
- Sign in to IRIS10 (see Logging in).
- Make sure you have access to the EMS Reading Update screen. Posting needs security level 4 on that screen. Administrators grant this level as described in Security Administration: access levels by user.
- Know how to add, edit, filter and save records in the shared data grid. See Grid viewing and editing and Grid filters.

Procedure

Enter a Reading Update

1. Open the EMS Reading Update screen (`/ems/readingupdate`).

   The grid shows the columns Equipment, Reading Date, Reading Hours, Reading Miles, Comments, Last Recorded Hour, Last Recorded Miles, Last Recorded Date, Equipment Status and Equipment Active.



The EMS Reading Update screen, with the toolbar and the reading columns.

   1. Filter editor: Filter to the readings you want to post

2. Post equipment reading updates
3. Reading and Last Recorded columns

2. Add a new record with the grid's add tool. You can enter it inline or in the pop-out editor.

   A new record opens. The pop-out editor shows the title **Reading Update** and the section **Reading Update Info**.

3. Choose the equipment from the **Equipment** dropdown.

   Last Recorded Hour, **Last Recorded Miles** and **Last Recorded Date** fill in automatically. You cannot edit these fields. **Equipment** is required. If it is missing, IRIS10 shows "Your {0} is required." with the field name in place of {0}.

4. Enter the **Reading Date**.
5. Enter the **Reading Hours**, the **Reading Miles**, or both.

   If a value is lower than the last recorded value, a warning appears (for example "The Hours just entered are less than the Last Recorded Hours Reading."). The warning does not stop you from entering the value.

6. Click **OK** to close the warning.
7. Optionally, enter **Comments**, up to 256 characters.
8. Save the record the same way you save any grid record.

   The record stays on the Reading Update grid until you post it.

Post Reading Updates

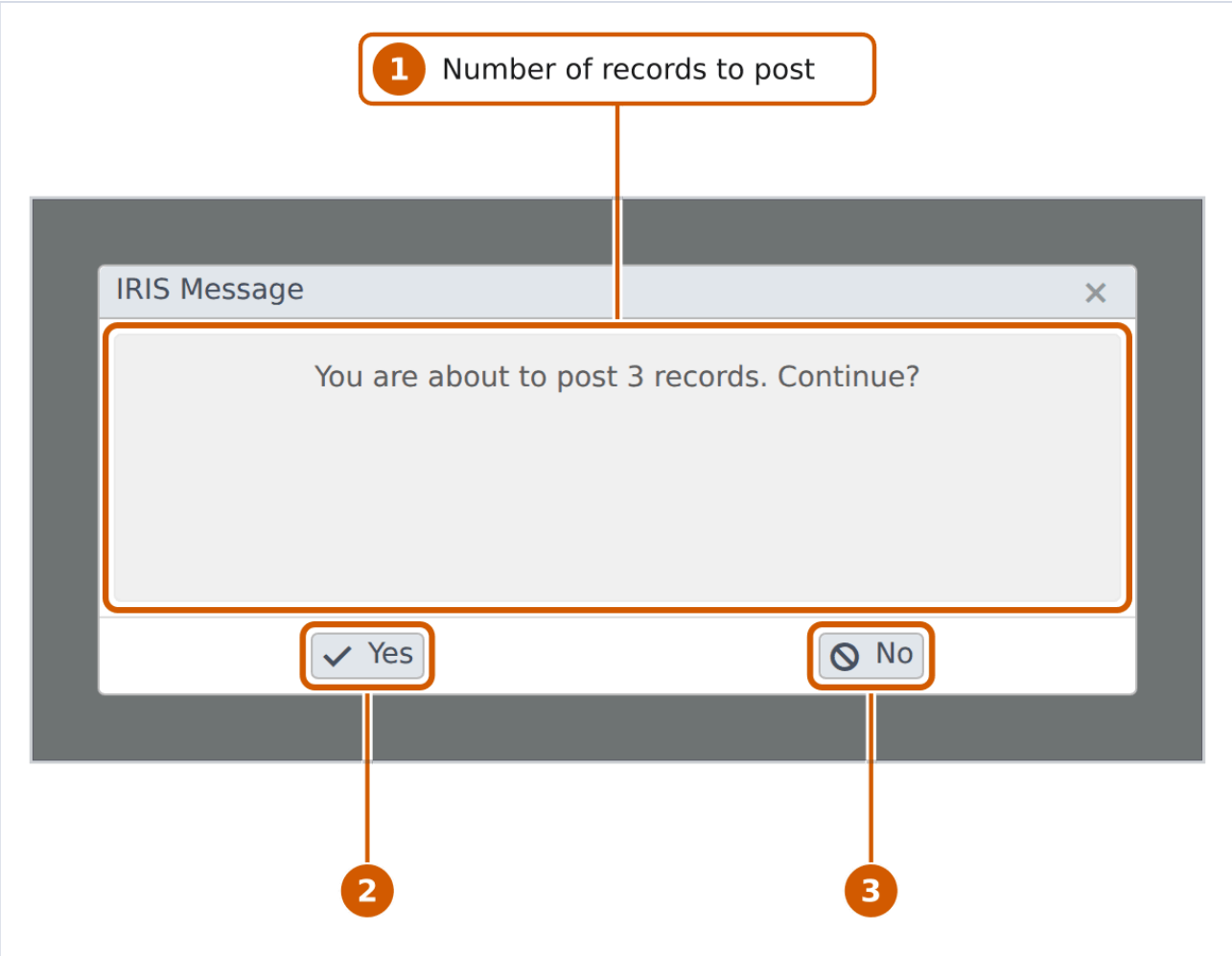
1. On the EMS Reading Update screen, filter the grid so it shows only the readings you want to post.

   Posting acts on every record that matches the current filter, including records on other pages. Selecting rows does not limit the records that posting sends.

2. Click **Post equipment reading updates** on the toolbar.

   > **Note:** Posting requires security level 4 on the EMS Reading Update screen.

   An "IRIS Message" window opens.



The confirmation that appears before posting. The count covers every record in the current filter.

1. Number of records to post
2. Yes posts
3. No cancels

3. Read the confirmation "You are about to post N records. Continue?". N is the number of records in the current filter.

   The window shows **Yes** and **No** buttons.

4. Click **Yes** to post.

   Posting starts. If you click **No** instead, the window cancels without posting.

5. Check the result.

   If posting succeeds, the grid reloads and "Reading updates posted successfully." appears. Posting adds the readings to Reading History with Reading Source "Update Readings", updates the equipment's last readings and removes the posted rows from the Reading Update grid. If the system rejects any readings, the EMS Reading Update Posting Errors window opens instead of the grid reloading.

Review and fix posting errors

1. In the EMS Reading Update Posting Errors window, review the "Posting Errors:" list.

   Each card shows one piece of equipment with a badge such as "2 Errors".
2. Read the table on each card. It shows the Field, the Invalid Entry and the Last Recorded value.
3. Optionally, download the errors with the CSV, PDF or JSON download icon. Hover over an icon to see which file type it downloads.

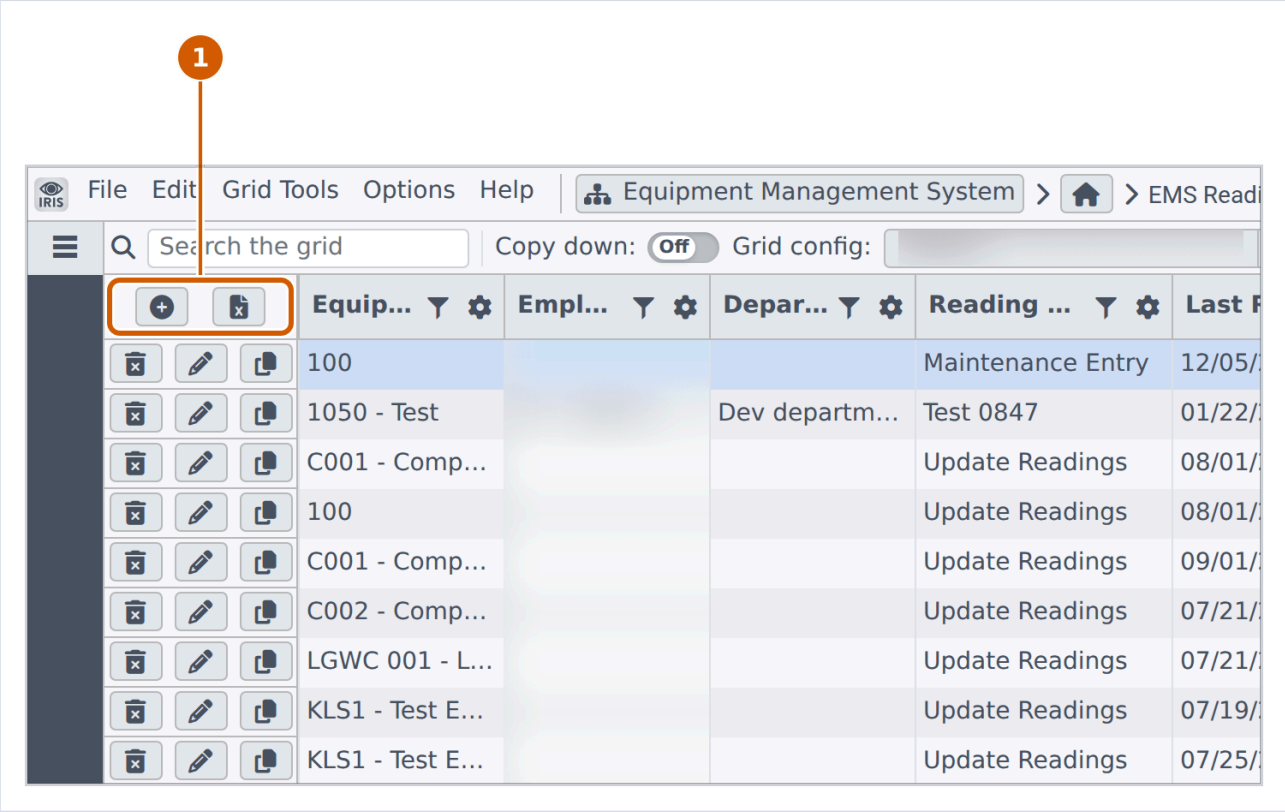
   The CSV file is named `ems-update-equipment-reading-posting-errors-<date>.csv`.
4. Close the window.

   The rejected readings stay on the Reading Update grid.
5. Correct the rejected readings on the Reading Update grid. Use the messages in Reasons a reading is rejected when posting.
6. Post again, as described in Post Reading Updates.

Correct a reading in Reading History

1. Open Reading History from the route you prefer:

ROUTE	HOW TO OPEN	WHAT OPENS
Equipment screen	With the equipment selected, click the tab button that opens its meter reading history. See Equipment tools: depreciation, policies and parts.	A warning asks you to check the readings so PM reports stay correct. After the warning, Reading History opens in a new browser tab.
Direct	Open the EMS Reading History screen (`/ems/readinghistory`).	The EMS Reading History grid.



The EMS Reading History grid, where you can correct posted readings.

1. Reading History columns

2. Find the reading you want to correct.
3. Open the reading for editing.

   The editor shows the title **Reading History** and the section **Reading History Info**.
4. Change the values you need: equipment, employee, department, Reading Source, reading date, hours, miles, lifetime totals or comments.
5. Make sure **Equipment** and **Reading Source** are filled in. **Reading Source** can be up to 50 characters and **Comments** up to 256.

   IRIS10 removes leading and trailing spaces when you save.
6. Save the record.

   Saving updates the history record. Saving does not recalculate the equipment's last readings or next PM due. If someone else changed the record after you loaded it, IRIS10 shows "Record has been modified by someone else since being queried from the database, refresh and try your update again.". Refresh the grid and make your change again.

Reference

EMS Reading Update grid columns

COLUMN	NOTES
Equipment	Required; chosen from a dropdown

COLUMN	NOTES
Reading Date	Date of the new reading
Reading Hours	New hour reading
Reading Miles	New mile reading
Comments	Up to 256 characters
Last Recorded Hour	Read-only
Last Recorded Miles	Read-only
Last Recorded Date	Read-only
Equipment Status	Status of the equipment
Equipment Active	Whether the equipment is active
Created Date / Created By / Last Updated Date / Updated By	Record audit columns

Reasons a reading is rejected when posting

MESSAGE	WHEN IT HAPPENS
Reading Date is before last recorded reading date of `<date>`	The Reading Date is earlier than the equipment's last recorded reading date
Reading Miles is before last recorded reading of `<miles>`	The Reading Miles is lower than the last recorded miles (checked only when both values are present)
Reading Hours is before last recorded reading of `<hours>`	The Reading Hours is lower than the last recorded hours (checked only when both values are present)
Reading already recorded	The Reading Date equals the last recorded date and either the hours or the miles equal the last recorded value

Messages when posting

MESSAGE	MEANING
You are about to post N records. Continue?	Confirmation before posting. N is every record in the current filter.
Reading updates posted successfully.	Posting succeeded. The grid reloads.
Unable to post reading updates due to a technical error. An email has been sent to support.	Posting failed because of a technical error. Support has been notified.

Posting Errors CSV file columns

The column names below are the headers in the CSV file.

COLUMN	CONTENTS
Equipment	The equipment
Submitted Date	Reading Date entered

COLUMN	CONTENTS
Submitted Miles	Reading Miles entered
Submitted Hours	Reading Hours entered
Last Recorded Date	Equipment's last recorded date
Last Recorded Miles	Equipment's last recorded miles
Last Recorded Hours	Equipment's last recorded hours
Error Messages	All messages for the reading, separated by a pipe (\

EMS Reading History grid columns

COLUMN	NOTES
Equipment	Required
Employee	
Department	
Reading Source	Required; up to 50 characters. Readings added by posting show "Update Readings".
Last Reading Date	
Last Reading Hours	
Last Reading Miles	
Lifetime Total Hours	
Lifetime Total Miles	
Comments	Up to 256 characters
Created Date / Created By / Last Updated Date / Updated By	Record audit columns
Notes / Documents	Notes and documents attached to the record

Tips and notes

Important: Posting acts on every record that matches the grid's current filter, including records on other pages, not only the rows you selected. Check the record count in the confirmation before you click **Yes**.

Tip: The low-reading warning during entry does not stop you from saving, but posting rejects hours or miles that are lower than the last recorded values. Fix the reading before you post.

Important: Editing a Reading History record does not recalculate the equipment's last readings or its next PM due date. Check the readings carefully so PM reports stay correct.

> **Note:** The Options menu also has a Post Reading Update Record(s) item. This page uses the **Post equipment reading updates** toolbar button.

> **Note:** When you post readings, IRIS10 sends an EMS reading update post notification. See Notifications.

Related topics

- Grid filters
- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user
- Notifications
- Maintenance entries
- Equipment maintenance history
- Equipment tools: depreciation, policies and parts

Equipment maintenance history

Overview

Maintenance history is created when you post maintenance entries or work orders. You cannot add or edit maintenance history on the **Maintenance History** screen. **Void** is the only way to change a record there.

Use this page to:

- Review the maintenance history posted for equipment.
- Void a maintenance history record that was posted in error, and see what the void reverses.
- Review an item's department and employee assignment history.
- Review the costs charged to equipment on the **Equipment Costs** screen.
- Open these history screens from the **Equipment** screen, filtered to one piece of equipment.

For how history is created, see Maintenance entries and Work orders.

Before you begin

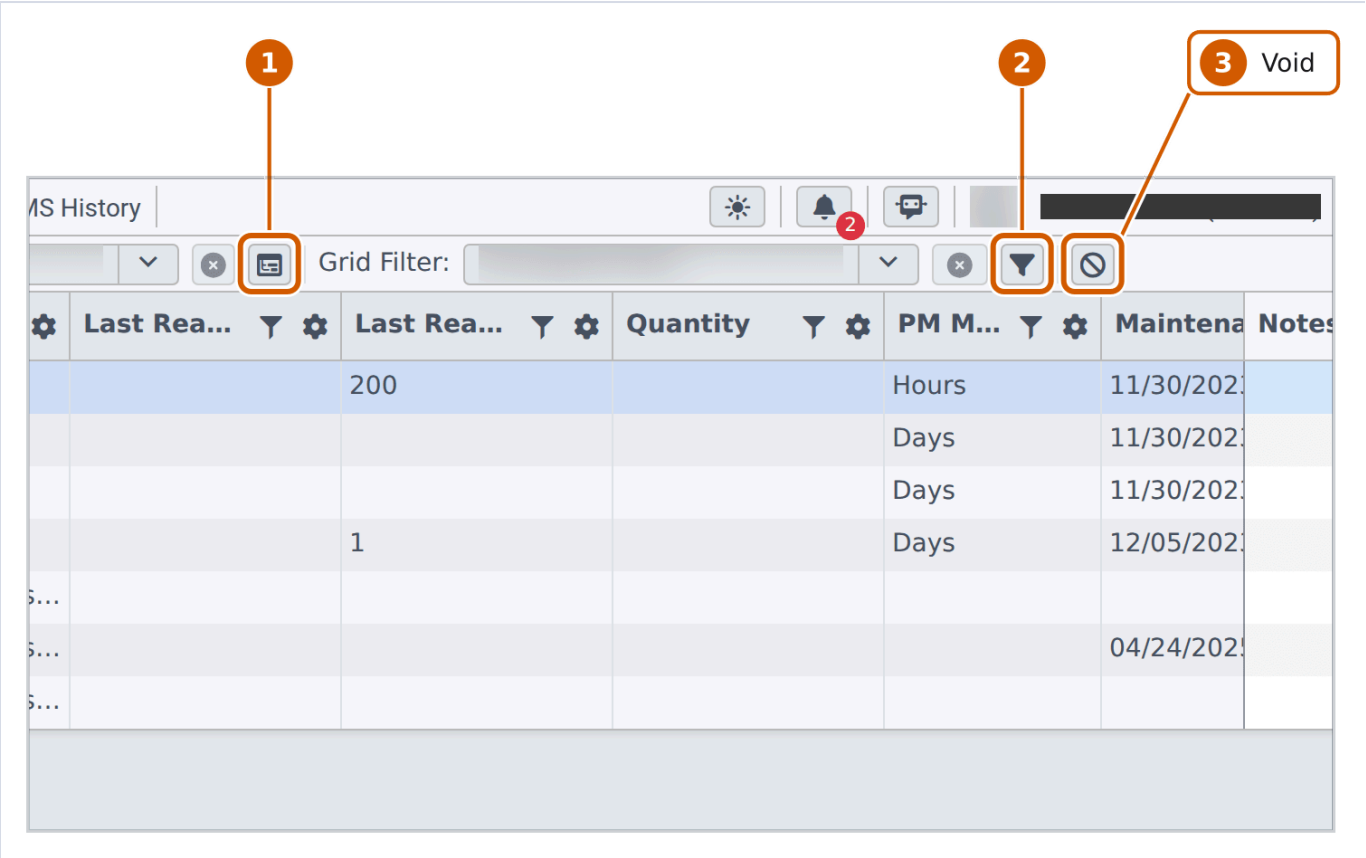
- Sign in to IRIS10.
- Make sure you have access to the Equipment Management screens.
- To void a record, you need security level 4 on the **Maintenance History** screen. See Security Administration: access levels by user.

Procedure

Review maintenance history

1. Open the **Maintenance History** screen (the path in the browser is `/ems/history`).

   The **Maintenance History** grid opens with columns such as **Equipment**, **Policy**, **Maintenance Date**, **Work Order** and **Posted From Work Order**. There is no button for adding records.



The Maintenance History screen. Void is on the toolbar; there is no button for adding records.

1. Grid configuration editor
2. Filter editor
3. Void

2. Click **Filter editor** on the toolbar to limit the grid, for example to one piece of equipment or a range of maintenance dates.

   The grid filter editor opens. When a filter is applied, **Clear filter** becomes available so you can remove it. See Grid filters.
3. Click **Grid configuration editor** to choose which columns are shown and how they are arranged.

   The grid configuration editor opens. **Clear grid configuration** goes back to the default layout. See Grid configurations.
4. Read the **Posted From Work Order**, **Work Order** and **Work Order Detail** columns to see whether a record was posted from a work order or from a maintenance entry.

Void a maintenance history record

1. On the **Maintenance History** screen, select the record you want to void.

   > **Note:** Only users with security level 4 on this screen can void.

2. Click **Void** on the toolbar.

A confirmation prompt opens. If you did not select a record, the message `Please select a maintenance history record to void.` appears instead.

> **Note:** Users below security level 4 do not see the **Void** button. **Void** is on the toolbar only; there is no **Options** menu item for it.

3. Read the prompt.
   - For a record posted from a work order, it reads `Work order <number> posted <N> maintenance history record(s).` It says that the void removes the record (or all N records, not only the one you selected) and clears the posted flag on the work order, then asks `Continue?`. The work order number is the work order's number, or `#<key>` if the work order has no number. The count is the number of maintenance history records for that work order.
   - For a record that did not come from a work order, it reads `This record did not come from a work order. The void removes this record only, and rolls the equipment reading back. Continue?`

   If IRIS10 cannot read the count, the message `An error occurred while reading the records for that work order. An email has been sent to support.` appears and no void is offered.
4. Click **Void** in the prompt to go ahead.

> **Note:** To stop instead, click **Cancel**. **Cancel** closes the prompt and changes nothing.

5. Wait for the void to finish.

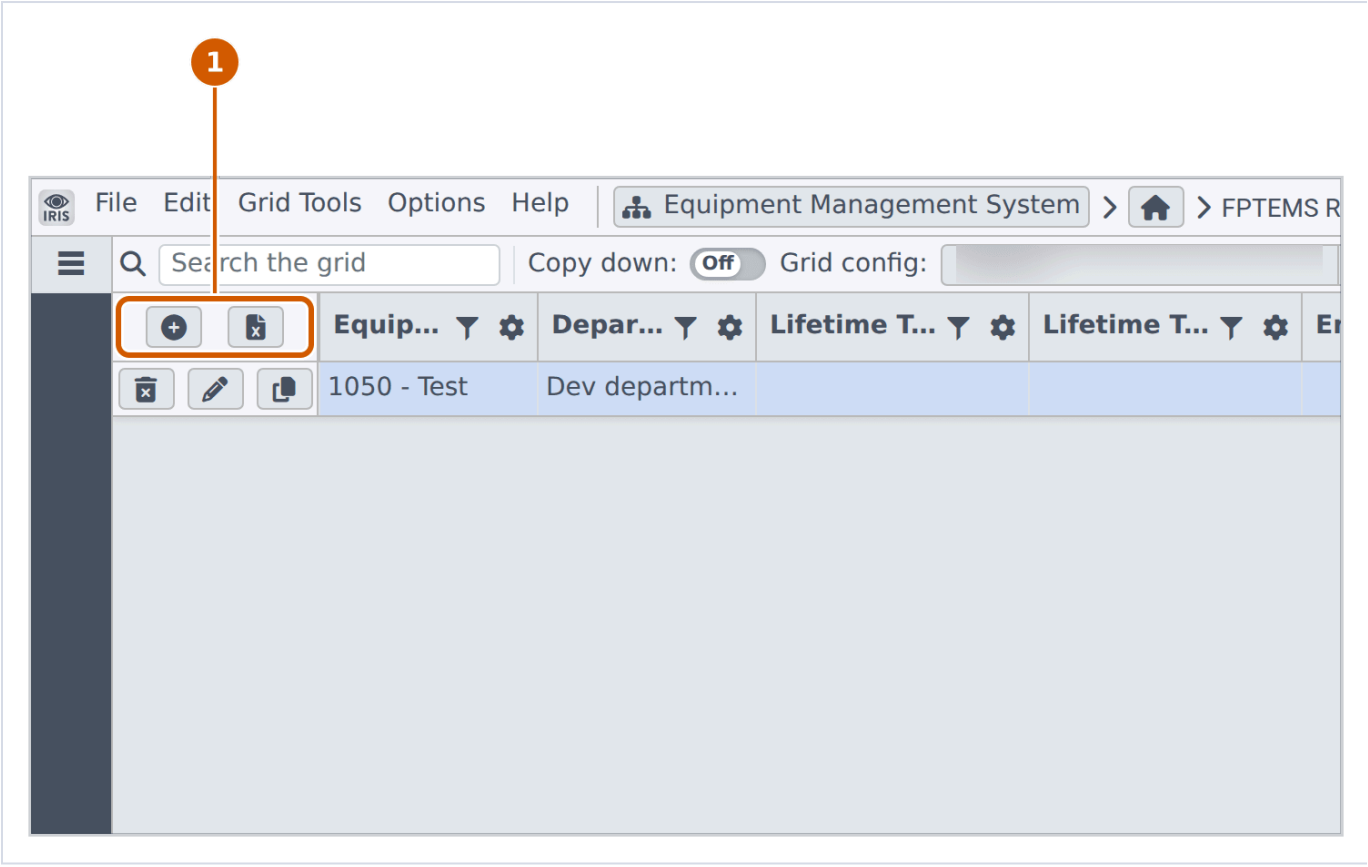
   If the void works, the grid refreshes and `The void completed successfully.` appears. If the void is refused for a validation reason, the reason is shown. If the void fails for any other reason, `An error occurred during the void. An email has been sent to support.` appears.

Review assignment history for one piece of equipment

1. Open the equipment record on the **Equipment** screen and select the **Related Department History** tab.

   The tab lists department assignments, newest **Assigned Date** first.
2. Click **View Related Department History**.

   The **Related Department History** screen opens in a new browser tab, filtered to that equipment. The screen is read-only.



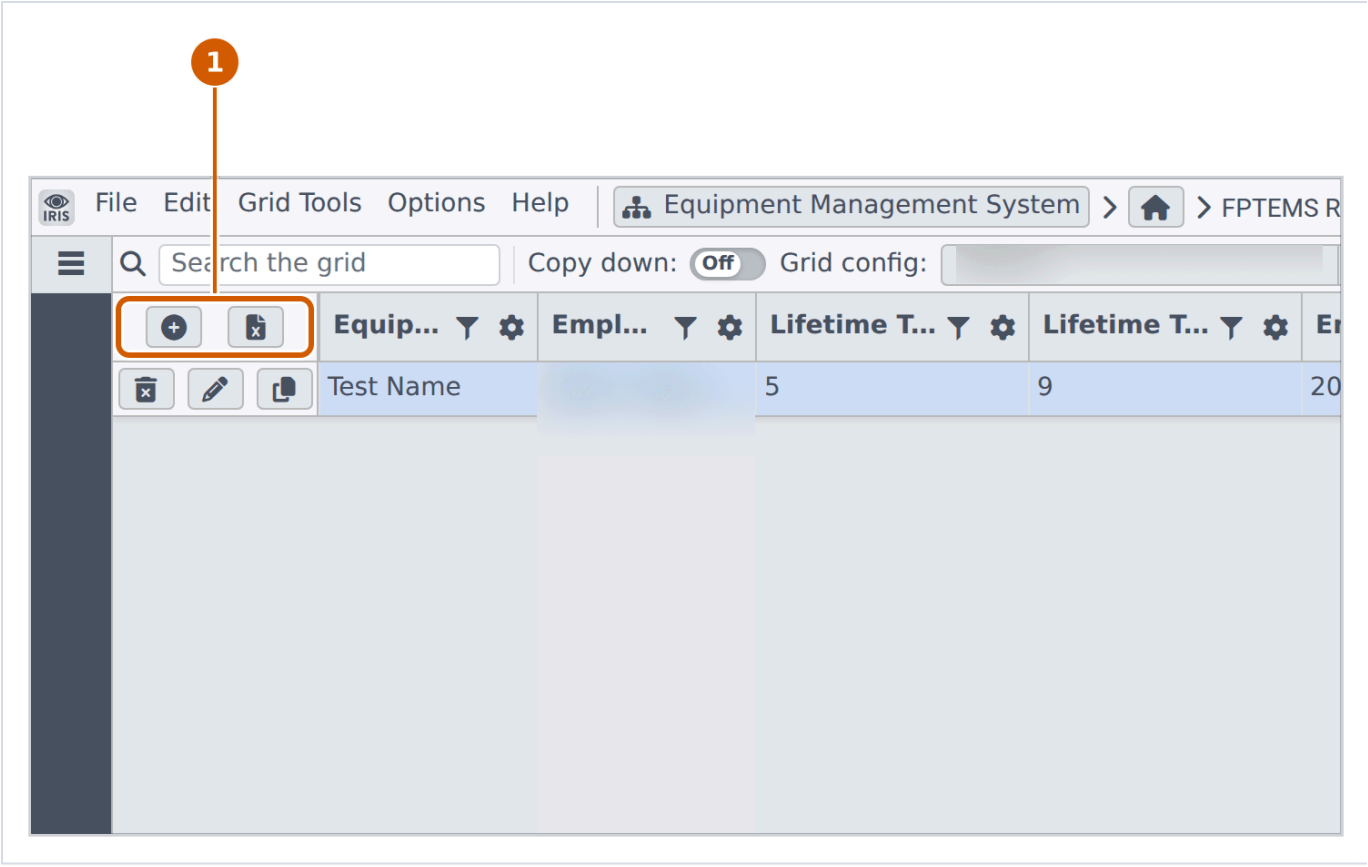
The read-only Related Department History screen.

1. Assignment history columns

3. Back on the **Equipment** screen, select the **Related Employee History** tab.

   The tab lists employee assignments, newest **Assigned Date** first.
4. Click **View Related Employee History**.

   The **Related Employee History** screen opens in a new browser tab, filtered to that equipment. The screen is read-only.



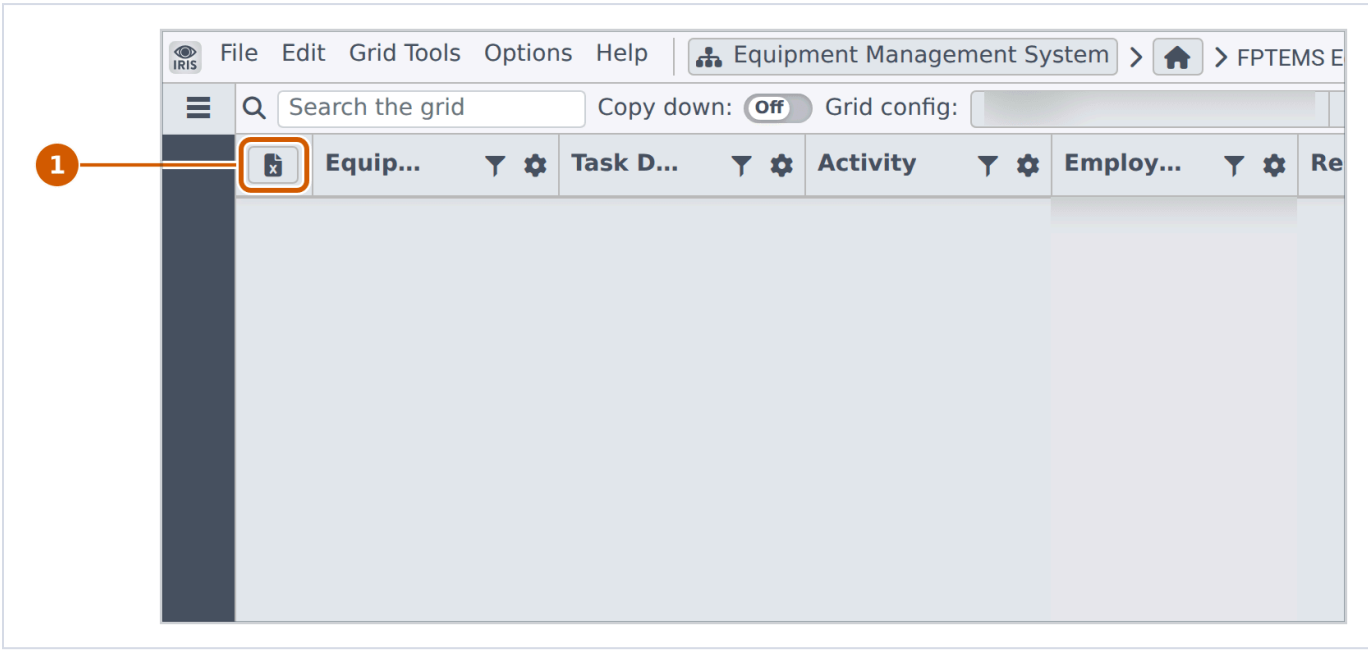
The read-only Related Employee History screen.

1. Assignment history columns

Review equipment costs

1. Open the **Equipment Costs** screen (the path in the browser is `/ems/equipmentcosts`).

   The read-only **Equipment Costs** grid opens with columns such as **Equipment**, **Task Date**, **Activity**, **Resource Type** and **Total Resource Cost**. There is no button for adding records.



The read-only Equipment Costs screen.

1. Cost columns
2. Use the equipment drop-down list on the toolbar to choose an equipment item.
3. Read the **Total cost** label on the toolbar.

   The label shows `Total cost: $` followed by the sum of **Total Resource Cost**, in red.

Reference

Maintenance History toolbar

BUTTON	TOOLTIP	NOTES
Clear grid configuration	Click to clear grid configuration.	Available only after the grid layout has been changed.
Grid configuration editor	Click to open grid configuration editor.	
Clear filter	Click to clear applied grid filter.	Available only while a filter is applied.
Filter editor	Click to open grid filter editor.	
Void	Void the selected record. A record posted from a work order takes every other record for that work order with it.	Shown only to users with security level 4.

Maintenance History columns

- **Equipment**
- **Part List**

- **Policy**
- **Vendor**
- **RepairType**
- **Last Reading Miles**
- **Last Reading Hours**
- **Quantity**
- **PM Method**
- **Maintenance Date (MM/dd/yyyy)**
- **Employee**
- **Work Order**
- **Work Order Detail**
- **Posted From Work Order**
- **Work Order Description**
- **Service Description**
- The user-defined fields (10). See User defined fields.
- **Created Date**
- **Created By**
- **Last Updated Date**
- **Updated By**
- **Notes**
- **Documents**

What a void reverses

ITEM	RECORD POSTED FROM A WORK ORDER	RECORD ENTERED BY HAND (FROM A MAINTENANCE ENTRY)
Maintenance history records	Every maintenance history record of that work order is removed, not only the one you selected.	Only the selected record is removed.
Reading history	The matching reading records are removed.	The matching reading record is removed.
Equipment last readings	Recalculated from the newest remaining reading.	Recalculated from the newest remaining reading.
PM schedule (last PM, next PM due, last maintenance date)	Recalculated from the newest remaining history record. If none remains, last PM is reset to 0 and next PM due and last maintenance date are cleared.	Recalculated from the newest remaining history record. If none remains, last PM is reset to 0 and next PM due and last maintenance date are cleared.
Work order	Detail lines and header become unposted again (posted flag cleared). A Closed work order goes back to Open and its closed date and time are cleared. Work orders that are Open or on Hold keep their status.	Not applicable.

ITEM	RECORD POSTED FROM A WORK ORDER	RECORD ENTERED BY HAND (FROM A MAINTENANCE ENTRY)
Maintenance entry	Not applicable.	The maintenance entry is restored on the **Maint Entry** screen as unposted. It is a new record and does not get its original key back.
Cost Accounting transactions	None created.	None created.
Notifications	None sent.	None sent.

How the next PM due is recalculated after a void

PM METHOD	NEXT PM DUE
Days	Date of the newest remaining record plus the PM frequency
Hours	Reading of the newest remaining record plus the PM frequency
Miles	Reading of the newest remaining record plus the PM frequency

Related Department History and Related Employee History columns

RELATED DEPARTMENT HISTORY	RELATED EMPLOYEE HISTORY
Equipment	**Equipment**
Department	**Employee**
Lifetime Total Hours	**Lifetime Total Hours**
Lifetime Total Miles	**Lifetime Total Miles**
Ending Lifetime Total Hours	**Ending Lifetime Total Hours**
Ending Lifetime Total Miles	**Ending Lifetime Total Miles**
Assigned Date	**Assigned Date**
Reassigned Date	**Reassigned Date**
Created Date	**Created Date**
Created By	**Created By**
Last Updated Date	**Last Updated Date**
Updated By	**Updated By**
Notes	**Notes**
Documents	**Documents**

Equipment Costs columns

- **Equipment**
- **Task Date**

- **Activity**
- **Employee**
- **Resource Type**
- **Pay Type**
- **Quantity**
- **Bill Rate**
- **Resource Rate**
- **Total Resource Cost**
- **Inventory Location**
- **Description**
- **Comments**
- **Created Date**
- **Created By**
- **Last Updated Date**
- **Updated By**

Messages

MESSAGE	WHEN IT APPEARS
`Please select a maintenance history record to void.`	You clicked **Void** without selecting a record.
`An error occurred while reading the records for that work order. An email has been sent to support.`	IRIS10 could not count the work order's records, so no void is offered.
`The void completed successfully.`	The void finished; the grid refreshes.
`An error occurred during the void. An email has been sent to support.`	The void failed for a reason other than validation.

Terms

TERM	MEANING
Void	Reverses a posted maintenance history record. For a record posted from a work order, all of that work order's history records are reversed.
Posted From Work Order	Shows whether the history record was posted from a work order rather than from a maintenance entry.
PM Method	How preventive maintenance is scheduled: by days, hours or miles.
Maintenance Date	The date the maintenance was performed, shown as MM/dd/yyyy.
Total Resource Cost	The cost of one resource line on **Equipment Costs**. The **Total cost** label adds these together.
Related Department History	Read-only history of the departments a piece of equipment has been assigned to.
Related Employee History	Read-only history of the employees a piece of equipment has been assigned to.

Tips and notes

Important: Voiding one record that was posted from a work order removes every maintenance history record of that work order, not only the one you selected. Read the record count in the prompt before you click **Void**.

Note: You cannot add or edit maintenance history on the **Maintenance History** screen. History is created by posting maintenance entries and work orders. To correct a posted record, void it, fix the maintenance entry or work order, and post it again.

Note: A void creates no Cost Accounting transactions and sends no notification. For voiding Cost Accounting transactions, see Transactions: void, reinstate and export.

Tip: A maintenance entry restored by a void comes back as a new unposted record on the **Maint Entry** screen. Search for it by its details, not by its old key.

Note: Related Department History, **Related Employee History** and **Equipment Costs** are read-only. You can also open each of them from its tab button on the **Equipment** screen; it opens in a new browser tab, filtered to that equipment.

Related topics

- Maintenance entries
- Work orders
- Reading updates
- Equipment tools: depreciation, policies and parts
- Grid filters
- Grid configurations
- Data grid overview and basics
- User defined fields
- Security Administration: access levels by user
- Transactions: void, reinstate and export

Equipment tools: depreciation, policies and parts

Overview

This page covers the tools on the Equipment screen that calculate depreciation, assign maintenance policies, and open the policy and part grids:

- **Calculate Depreciation** recalculates depreciation for all qualifying equipment up to a month-end date.
- **Assign Policies** opens a window where you assign policies to a piece of equipment or remove them. A separate screen assigns one policy to many equipment items.
- Tab buttons in the **Equipment Information:** panel open the Policy, Policy List, Part and Part List grids.

Before you begin

- Sign in to IRIS10 and work in the Equipment Management System portal.
- Know how to select rows and use the toolbar on a grid. See Data grid overview and basics and Grid viewing and editing.
- To calculate depreciation, you need access level 4 or higher on Equipment. See Security Administration: access levels by user.
- Fill in the Depreciation UOM and the cost, life and purchase details on the equipment records you want depreciated.

Procedure

Calculate depreciation for all equipment

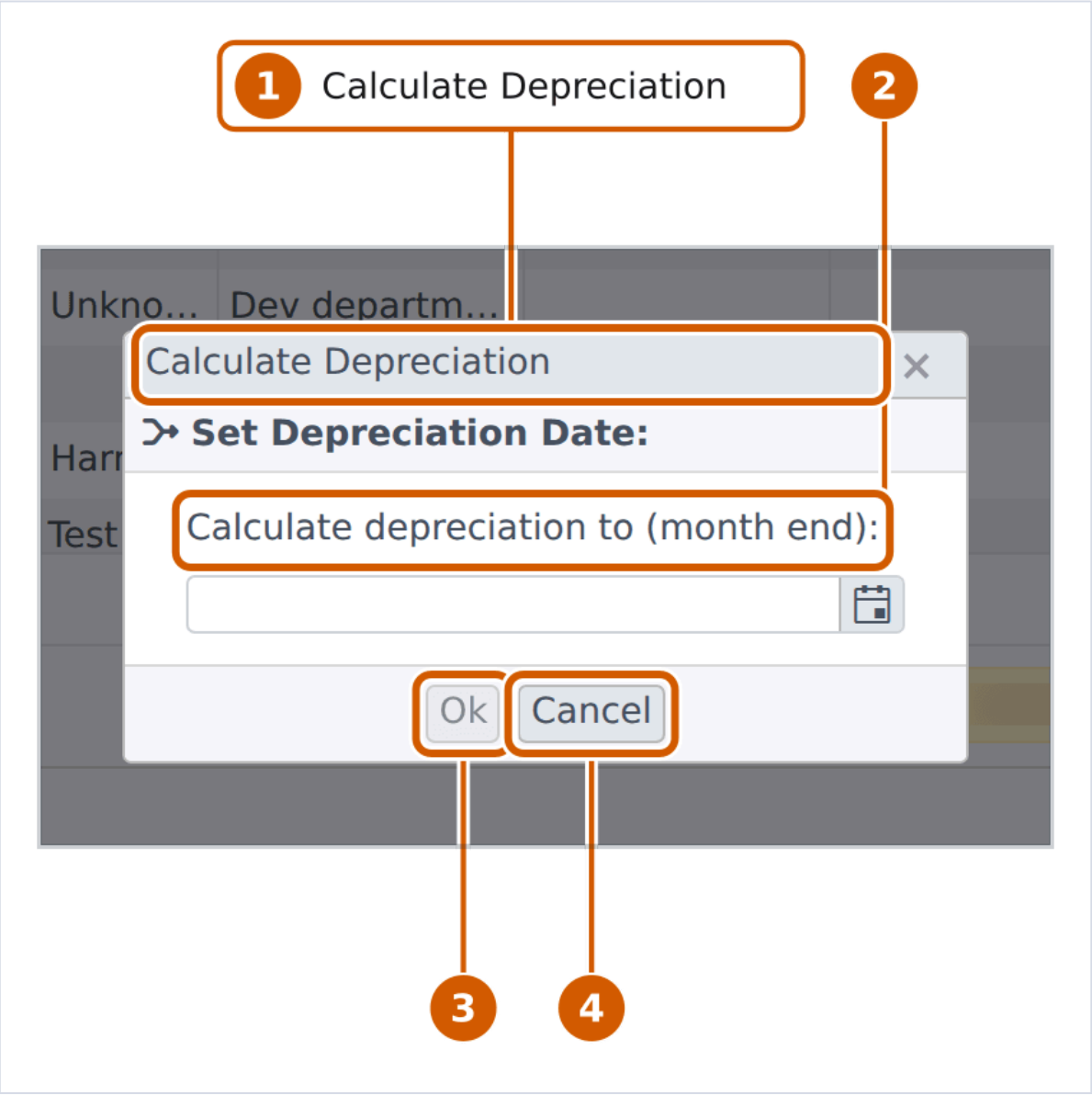
> **Important: Ok** in the Calculate Depreciation window recalculates every qualifying equipment record at once, whatever rows you have selected or filtered, and there is no further confirmation.

1. On the Equipment screen, open the Calculate Depreciation window:

ROUTE	WHERE	WHAT OPENS
Toolbar	Click the Calculate Depreciation toolbar button (tooltip "Click to calculate depreciation.")	The **Calculate Depreciation** window
Main menu	Choose **Options** > **Calculate Depreciation**	The **Calculate Depreciation** window

The window opens with the heading **Set Depreciation Date:**, an empty date picker, and **Ok** and **Cancel** buttons. **Ok** is disabled.

> **Note:** This step requires access level 4 or higher on Equipment.



The Calculate Depreciation window. Ok becomes available once you choose a month-end date.

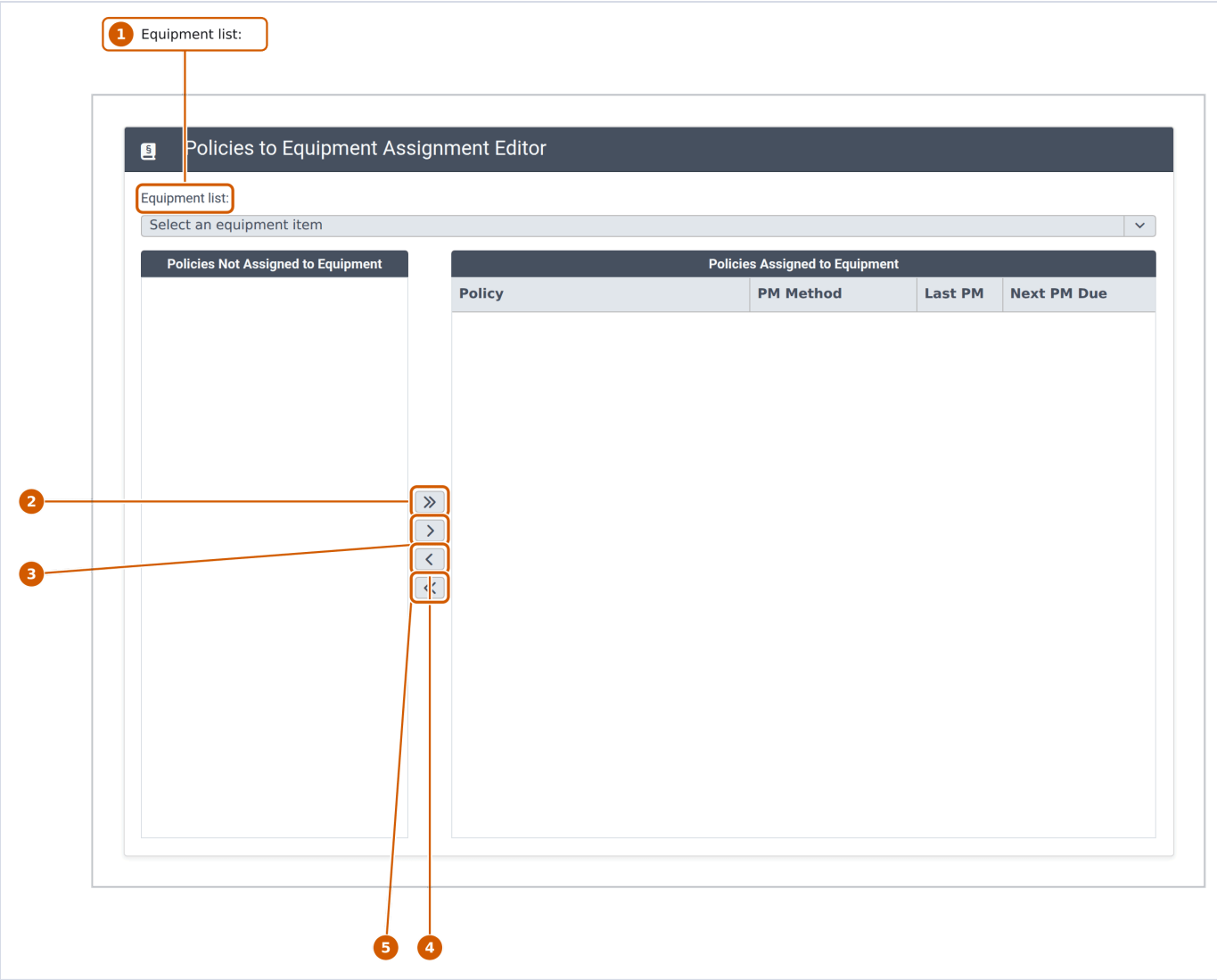
1. Calculate Depreciation
2. Calculate depreciation to (month end):
3. Ok (disabled until a date is chosen)
4. Cancel

2. In **Calculate depreciation to (month end):**, choose the month-end date to calculate depreciation to. **Ok** becomes available once a valid date is chosen. If the entry is not a date, the message "Please enter a valid date." appears. The month you choose counts as a whole month.

3. Click **Ok**. IRIS10 shows a loading indicator and recalculates depreciation for all qualifying equipment at once, whatever rows are selected or filtered. The window closes and the message "Depreciation was recalculated for N equipment records." (or "...for 1 equipment record.") appears. N counts only the qualifying records. The Equipment grid reloads to show the new values. No notification is sent.
4. To leave without calculating, click **Cancel** instead of **Ok**. The window closes and nothing is calculated.

Open the policy assignment for a piece of equipment

1. On the Equipment screen, select the equipment row in the grid. The row is selected. If you click a tab button without a selected row, the message "Select an equipment record first." appears.
2. In the **Equipment Information:** panel below the grid, click the **Assign Policies** tab button. A window titled **Assign Policies** opens with the same assignment screen as Policies to Equipment Assignment Editor. **Equipment list:** already shows the selected equipment, and both policy lists load.



Assigning policies to a piece of equipment. Each arrow saves as soon as you click it.

1. Equipment list:
2. Assign all
3. Assign one
4. Unassign one
5. Unassign all

> **Important:** The assign screens have no Save button. Every arrow click, including assign all and unassign all, saves at once with no confirmation.

Assign policies to a piece of equipment

1. If **Equipment list:** is empty, choose the equipment. You can type part of its name or description to filter the list. The **Policies Not Assigned to Equipment** list (left) and the **Policies Assigned to Equipment** list (right) show the policies for that equipment.

2. To assign one policy, select it in **Policies Not Assigned to Equipment**. The policy is selected.
3. Click the assign-one arrow (tooltip "Click to assign the selected policy to the selected equipment item."). The assignment saves at once, with no confirmation. A message "The policy: <name> was assigned to equipment item: <equipment>." appears for about 4 seconds, and both lists refresh. The new assignment starts with Last PM 0.
4. To assign every remaining policy, click the assign-all arrow (tooltip "Click to assign all policies to the selected equipment item."). All active policies not yet assigned are assigned at once, with no confirmation. Each starts with Last PM 0 and a blank Next PM Due. The message "All policies assigned for the selected equipment item." appears.

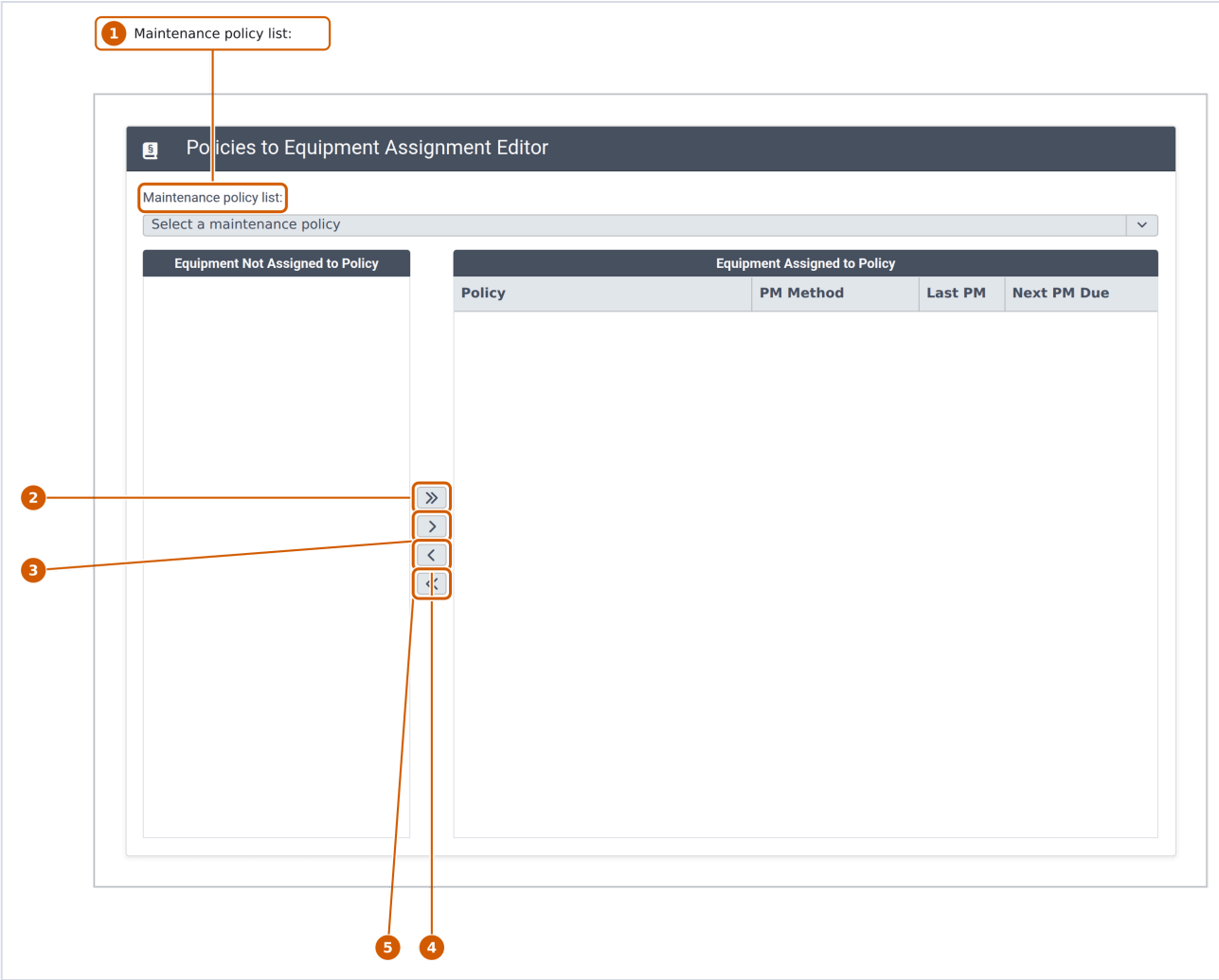
Unassign policies from a piece of equipment

1. To unassign one policy, select it in **Policies Assigned to Equipment**. The policy is selected.
2. Click the unassign-one arrow (tooltip "Click to unassign the selected policy from the selected equipment item."). The assignment is removed at once, with no confirmation, together with that equipment's PM schedule for the policy (Last PM, Next PM Due) and the assignment's comments and documents. A message "The policy: <name> was unassigned from equipment item: <equipment>." appears and both lists refresh.
3. To remove every policy from the equipment, click the unassign-all arrow (tooltip "Click to unassign all policies from the selected equipment item."). All assignments and their PM schedules are removed at once, with no confirmation. The message "All policies unassigned for the selected equipment item." appears.

> **Important:** Unassigning a policy removes that equipment's PM schedule for the policy, including Last PM and Next PM Due. Only the single unassign arrow also deletes the assignment's comments and documents. Unassign all removes the assignments and their PM schedules without that step.

Assign a policy to many equipment items

1. Open the policy-to-equipment assignment screen (browser path `/ems/policyequipassign`). The screen shows **Maintenance policy list:** and the lists **Equipment Not Assigned to Policy** (left) and **Equipment Assigned to Policy** (right), with four arrow buttons between them.



Assigning one maintenance policy to many equipment items.

1. Maintenance policy list:
2. Assign all
3. Assign one
4. Unassign one
5. Unassign all

2. In **Maintenance policy list:**, choose the policy. You can type part of its name to filter the list. The equipment lists load for that policy.
3. Click the assign-all arrow (tooltip "Click to assign all the equipment items to the selected policy.") to assign every remaining equipment item. The assignment saves at once, with no confirmation. Assign all adds only active equipment not yet assigned to the policy. Each new assignment starts with Last PM 0 and a blank Next PM Due.
4. Alternatively, select equipment and click the assign-one arrow (tooltip "Click to assign the selected equipment items to the selected policy."). The assignment saves at once, with no confirmation.
5. To remove one equipment item, click the unassign-one arrow (tooltip "Click to unassign the selected equipment item from the selected policy."). The assignment and the equipment's PM schedule for the policy are removed at once, with no confirmation.

6. To remove all equipment, click the unassign-all arrow (tooltip "Click to unassign all equipment items from the selected policy."). The assignments and the equipment's PM schedule for the policy are removed at once, with no confirmation.

Reference

Depreciation methods (by Depreciation UOM)

Depreciation is calculated only for equipment that meets its method's criteria.

DEPRECIATION UOM	EQUIPMENT INCLUDED ONLY IF	HOW DEPRECIATION IS WORKED OUT	LIMIT
Years	Total cost above 0, expected life above 0, and a purchase date before the month after the chosen date	Straight line: (total cost − salvage value) ÷ expected life ÷ 12, times the whole months from the purchase date to the end of the chosen month	After the expected life has passed, depreciation stays at cost minus salvage value and the current-year amount is 0
Miles	Expected life above 0, purchase price above 0, a purchase date and a last miles reading	((purchase price + setup cost − salvage) ÷ expected life) × last miles reading	Capped at purchase price plus setup cost minus salvage
Hours	Expected life above 0, purchase price above 0, a purchase date and a last hours reading	((purchase price + setup cost − salvage) ÷ expected life) × last hours reading	Capped at purchase price plus setup cost minus salvage

Miles-based equipment uses its last miles reading, and hours-based equipment uses its last hours reading. See Reading updates. For units of measure and fiscal years, see Units of measure, fiscal years and organizations.

Calculate Depreciation window

ITEM	WHAT IT DOES
Set Depreciation Date:	Heading of the window
Calculate depreciation to (month end):	Date picker for the month-end date. Starts empty each time the window opens.
Ok	Disabled until a valid date is chosen. Recalculates all qualifying equipment at once.
Cancel	Closes the window without calculating

Arrow buttons on the equipment-to-policies screen

BUTTON	TOOLTIP
Assign all	Click to assign all policies to the selected equipment item.

BUTTON	TOOLTIP
Assign one	Click to assign the selected policy to the selected equipment item.
Unassign one	Click to unassign the selected policy from the selected equipment item.
Unassign all	Click to unassign all policies from the selected equipment item.

Arrow buttons on the policy-to-equipment screen

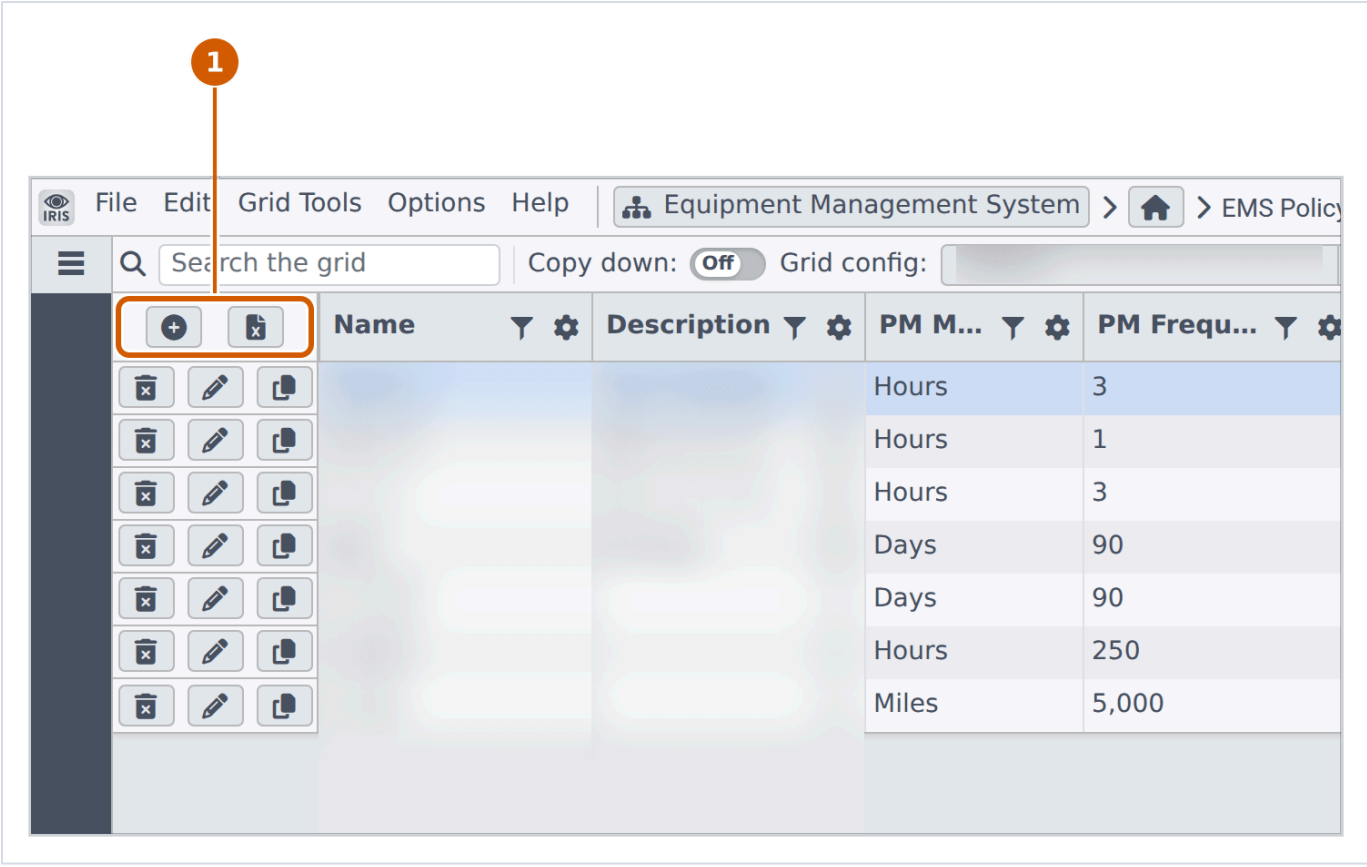
BUTTON	TOOLTIP
Assign all	Click to assign all the equipment items to the selected policy.
Assign one	Click to assign the selected equipment items to the selected policy.
Unassign one	Click to unassign the selected equipment item from the selected policy.
Unassign all	Click to unassign all equipment items from the selected policy.

Assigned-list columns on both assign screens

COLUMN	SHOWS
Policy	The assigned item
PM Method	The policy's PM method
Last PM	The last PM value; 0 for a new assignment
Next PM Due	When the next PM is due; blank for a new assignment

Policy, Policy List, Part and Part List grids

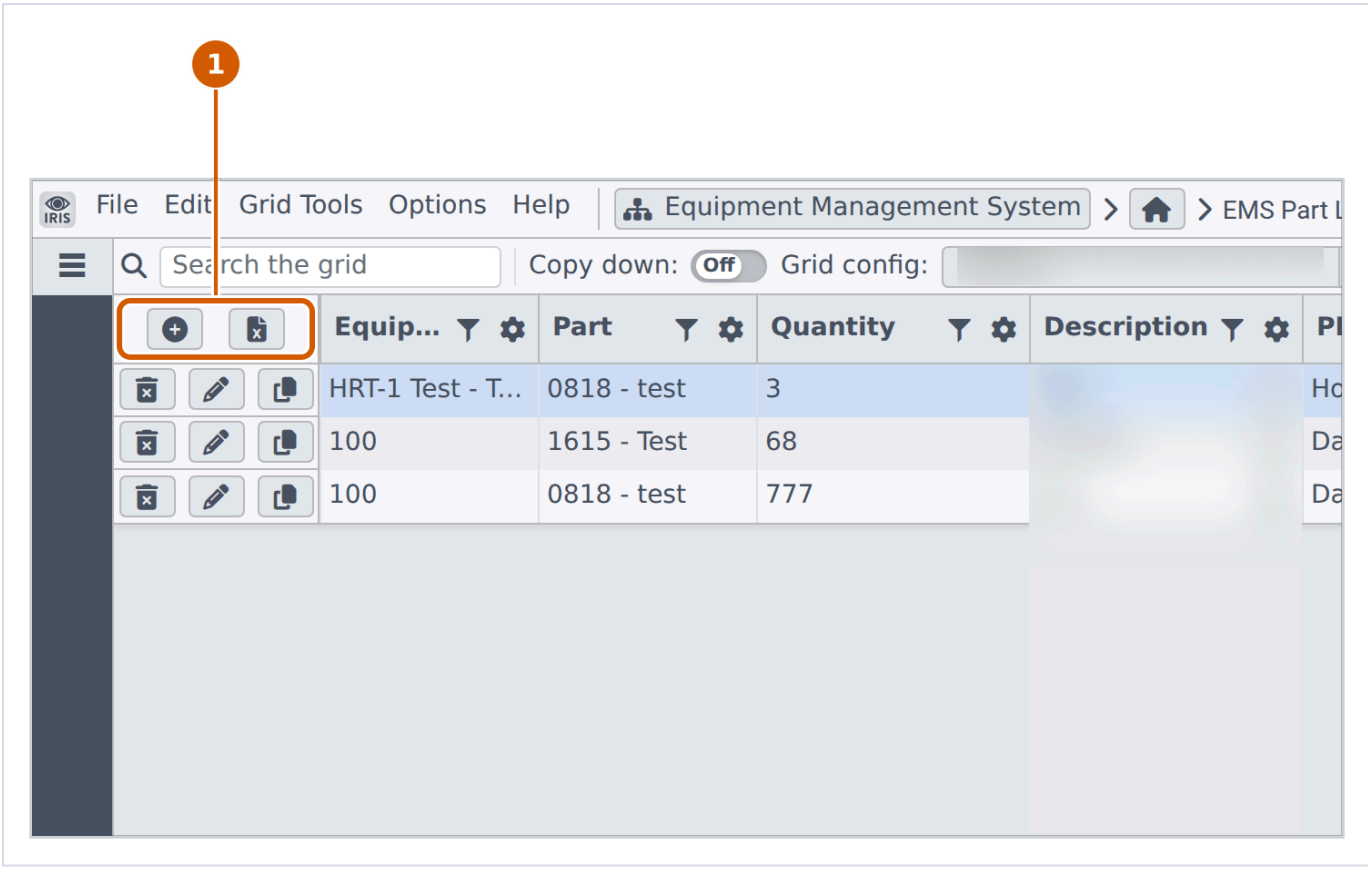
Policy, Policy List, Part and Part List are ordinary grids opened from the Equipment screen's tab buttons. View, filter and edit them as described in Grid viewing and editing.



The Policy grid lists maintenance policies with their PM method, frequency and warnings.

1. Grid column headings

The Policy grid has these columns: Name, Description, PM Method, PM Frequency, PM Due Warning Miles, PM Due Warning Hours, PM Due Warning Days, Active, Created Date, Created By, Last Updated Date, Updated By, Notes and Documents.



The Part List grid shows the parts assigned to equipment.

1. Grid column headings

The Part List grid has these columns: Equipment, Part, Quantity, Description, PM Method, Created Date, Created By, Last Updated Date, Updated By, Notes and Documents.

Messages you may see

MESSAGE	WHEN	WHAT TO DO
Select an equipment record first.	A tab button was clicked with no equipment row selected	Select a row in the Equipment grid, then click the button again
Please enter a valid date.	The depreciation date is not a date	Choose a date from the date picker
Depreciation was recalculated for N equipment record(s).	Calculation finished	Review the Depreciation columns in the reloaded grid
The equipment depreciation could not be calculated. IRIS Support has been notified.	Calculation failed (a more specific message may appear instead)	Read the message; contact your administrator if it continues
Unable to calculate depreciation due to a technical error. An email has been sent to support.	A technical error stopped the calculation	Try again later or contact support

MESSAGE	WHEN	WHAT TO DO
Please select a piece of equipment from the equipment dropdown list before attempting to assign all policies.	Assign all clicked with no equipment chosen	Choose equipment in **Equipment list:**
Please select a piece of equipment from the equipment dropdown list before attempting to unassign all policies.	Unassign all clicked with no equipment chosen	Choose equipment in **Equipment list:**
There are no unassigned policies to assign to the selected equipment item.	Assign one clicked when every policy is already assigned	No action needed
Please select a policy from the unassigned policies list to assign it to the current equipment item.	Assign one clicked with no policy selected	Select a policy in the left list first
There are no assigned policies to unassign from the selected equipment item.	Unassign one clicked when nothing is assigned	No action needed
Please select a policy from the assigned policies list to unassign it from the current equipment item.	Unassign one clicked with no policy selected	Select a policy in the right list first
Unable to assign all the policies for the selected equipment item.	Assign all failed	Try again; contact your administrator if it continues

Tips and notes

Important: Before it recalculates, IRIS10 sets depreciation to 0 on every equipment record. Equipment that no longer meets its method's criteria (for example, missing cost, life, purchase date or reading) ends with 0 rather than an old value.

Note: The count in "Depreciation was recalculated for N equipment record(s)." includes only equipment that met its method's criteria, not all equipment.

Note: For Years-based equipment, the current-year depreciation uses a fiscal year from July 1 to June 30.

Note: When your county uses Cost Accounting hours for depreciation, only equipment depreciated by Hours has its last hours reading refreshed from Cost Accounting first. See Cost Accounting screen tools.

Note: IRIS10 remembers the date of the most recent depreciation calculation.

Tip: Assign all skips inactive policies (or inactive equipment on the policy-to-equipment screen) and anything already assigned, so it is safe to use after adding a new policy or piece of equipment.

> **Note:** Removed policy assignments are kept in the audit history.

> **Tip:** The tab buttons in the **Equipment Information:** panel (for example **Edit Last PM**, **Assign Parts**, maintenance history, costs and work order) open the related screen in a new browser tab, filtered to the selected equipment. **Assign Policies** opens a window instead. The chevron button ("Close the equipment information panel.") collapses and expands the panel. For maintenance history, see Equipment maintenance history.

> **Important:** Before it opens, the **Edit Meter Reading History** tab button warns: "If you edit or delete the most recent equipment reading, check the readings on the Equipment screen and the Edit Last PM screen so the PM reports stay correct."

Related topics

- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user
- Reading updates
- Cost Accounting screen tools
- Units of measure, fiscal years and organizations
- Equipment maintenance history

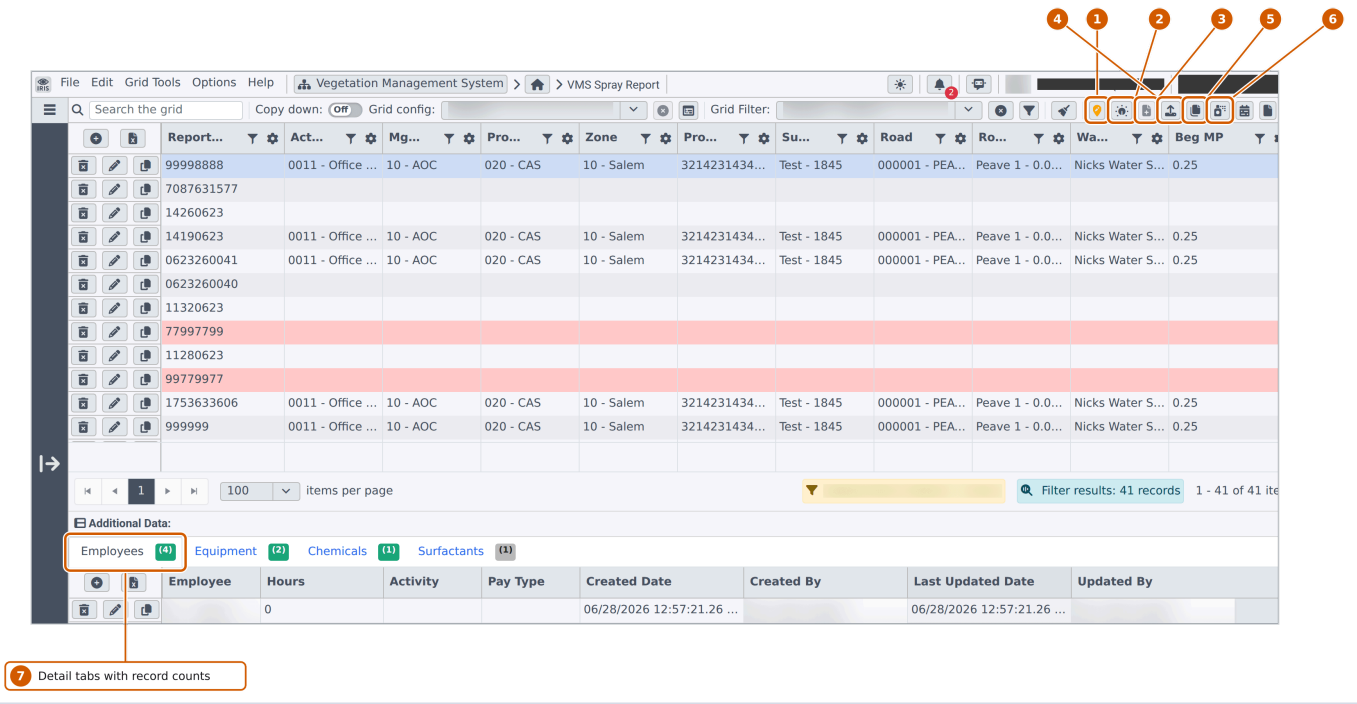
Spray reports

Overview

The Spray Report screen in the Vegetation Management module holds your Spray Reports. A Spray Report records one herbicide spray job: where and when it was sprayed, the conditions, and the employees, equipment, Chemicals and Surfactants used. The grid lists reports with the newest at the top. Below the grid, the **Additional Data:** panel has the **Employees**, **Equipment**, **Chemicals** and **Surfactants** tabs.

On this screen you can:

- Record a Spray Report with its location, spray conditions and site details.
- Add the employees, equipment, Chemicals and Surfactants used for the job.
- Save the Use Location (township/range/section, GPS points and address) for a Spray Report.
- Copy an existing Spray Report.
- Post Spray Reports to cost accounting (CAS) as timecards.
- Deactivate the Spray Reports in the current filter.
- View or print the Spray Report, the daily spray log and a blank spray report form.



The Spray Report screen with a report selected. The toolbar holds the spray report actions, and the tabs below the grid show the selected report's employees, equipment, chemicals and surfactants.

1. Set Use Location
2. Deactivate all (whole filter)
3. Create PURS EDS File (not available)

4. Post to CAS
5. Duplicate report
6. View and print reports
7. Detail tabs with record counts

Before you begin

- Sign in to IRIS10 with access to the Vegetation Management module and the Spray Report screen.
- Make sure you have security level 4 on the Spray Report screen. The toolbar actions need it. See Security Administration: access levels by user.
- Know how to use the shared data grid: selecting rows, filtering, and adding and editing records. See Grid viewing and editing and Grid filters.
- To post, set up employees, equipment and materials with pay types and rates in cost accounting. See Posting timecards.

Procedure

Open and review Spray Reports

1. Open the Spray Report screen in the Vegetation Management module. The Spray Report grid opens with the newest reports at the top.
2. If you need to, filter the grid to the reports you want to work with. The grid shows only the reports that match the filter.
3. Click a Spray Report row to select it. The **Employees**, **Equipment**, **Chemicals** and **Surfactants** tabs in the **Additional Data:** panel become available and show the records for that report. The grid lets you select more than one row.
4. Click a tab (**Employees**, **Equipment**, **Chemicals** or **Surfactants**) to see that part of the report. The tab label shows how many records it holds, for example **Employees (4)**.

Create a Spray Report

1. Add a new record in the Spray Report grid. The Spray Report editor opens with the **Spray Report Info** section.
2. Leave the **Report Number** auto-generate switch on to have IRIS10 number the report, or turn it off to type your own number. When the switch is on, the **Report Number** field is disabled and shows the pattern `MMDDYY####`. When it is off, the field is enabled and shows `Enter Report Number`. A typed number can be up to 10 characters. IRIS10 remembers the switch setting in your browser.
3. Fill in the spray details, for example **Activity**, **Mgt Unit**, **Program**, **Zone**, **Project**, **Road**, **Beg MP** and **End MP**, **Spray Date**, **Start Time** and **End Time**, **Weather**, **Wind Direction**, **Wind Speed** and **Temperature**. **Beg MP** and **End MP** accept values from 0 to 9999.

4. Fill in the required fields **Site Category**, **Specific Site** and **Area Sprayed**. If you leave one empty, IRIS10 shows `Your {field} is required.`
5. Save the record. The new report appears in the grid as Active.

Add employees, equipment, Chemicals and Surfactants

1. Select the Spray Report in the grid. The detail tabs become available.
2. On the **Employees** tab, add each employee with **Employee** and **Hours**, plus **Activity** and **Pay Type**. The employee appears in the **Employees** tab.

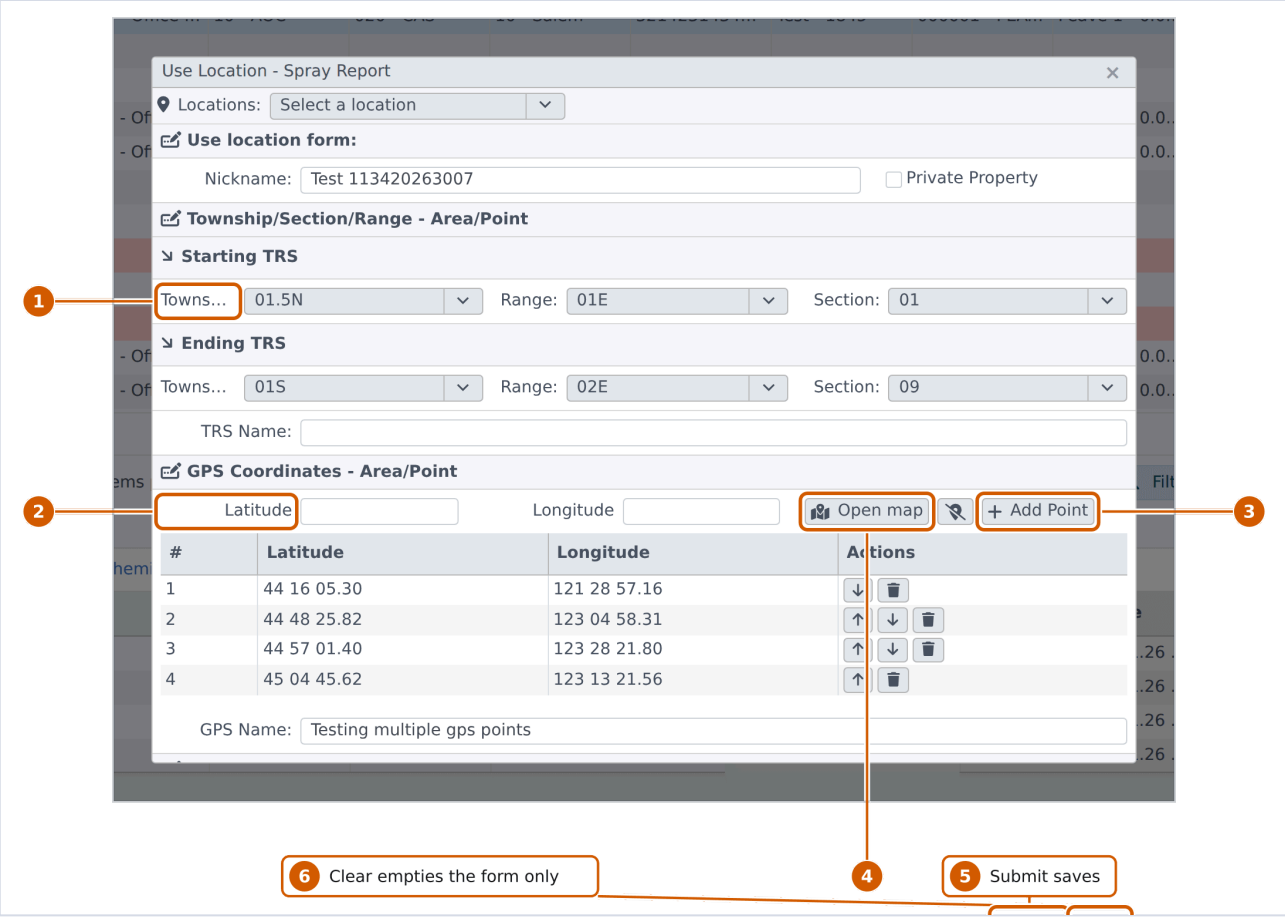
   > **Note: Pay Type** is optional on the tab. You cannot post the report to CAS until every employee has a **Pay Type**.

3. On the **Equipment** tab, add each piece of equipment with **Equipment** and **Hours**, plus any of **Activity**, **Spray Delivery**, **Spray Application**, **Spray Pressure** and **Swath**. The equipment appears in the **Equipment** tab.
4. On the **Chemicals** tab, add each chemical with **Agent Products**, **Agent Supplier**, **Quantity**, **Agent UOM**, **Agent Purpose**, **Rate 1**, **Rate UOM 1**, **Rate 2** and **Rate UOM 2**. **Activity** is optional. The chemical appears in the **Chemicals** tab.
5. On the **Surfactants** tab, add each surfactant with **Surfactant**, **Quantity**, **Agent UOM**, **Rate 1**, **Rate UOM 1**, **Rate 2** and **Rate UOM 2**. **Activity** is optional. The surfactant appears in the **Surfactants** tab.

Set the Use Location

1. Select one Spray Report in the grid. The row is highlighted as selected.
2. Click **Set Use Location** on the toolbar. The **Use Location - Spray Report** window opens. If no row is selected, IRIS10 shows `Please select a record before using the set location feature.`

   > **Note:** Use the toolbar button. **Set Use Location** is greyed out in the Options menu.



The Use Location - Spray Report window holds the township/range/section, GPS points and address for the selected report.

1. Township, Range, Section
2. Latitude and Longitude
3. Add Point (Oregon only)
4. Open map
5. Submit saves
6. Clear empties the form only

3. Enter a **Nickname:** for the location.
4. Choose the starting and ending **Township:**, **Range:** and **Section:**. **Township:** and **Range:** offer values from lookup lists. **Section:** offers 00 to 36.
5. If you need to, enter a **TRS Name:**.
6. Enter a **GPS Name:** for the whole location. **GPS Name:** holds up to 75 characters. It names the location, not a single point.
7. Type a **Latitude** and **Longitude**.
8. Click **Add Point**. IRIS10 adds the point to the GPS point list. IRIS10 rejects coordinates outside Oregon. Repeat steps 7 and 8 for each point.
9. If you need to, click **Move up**, **Move down** or **Remove** beside a point to reorder or drop it. The list updates. IRIS10 deletes the points you remove when you submit.

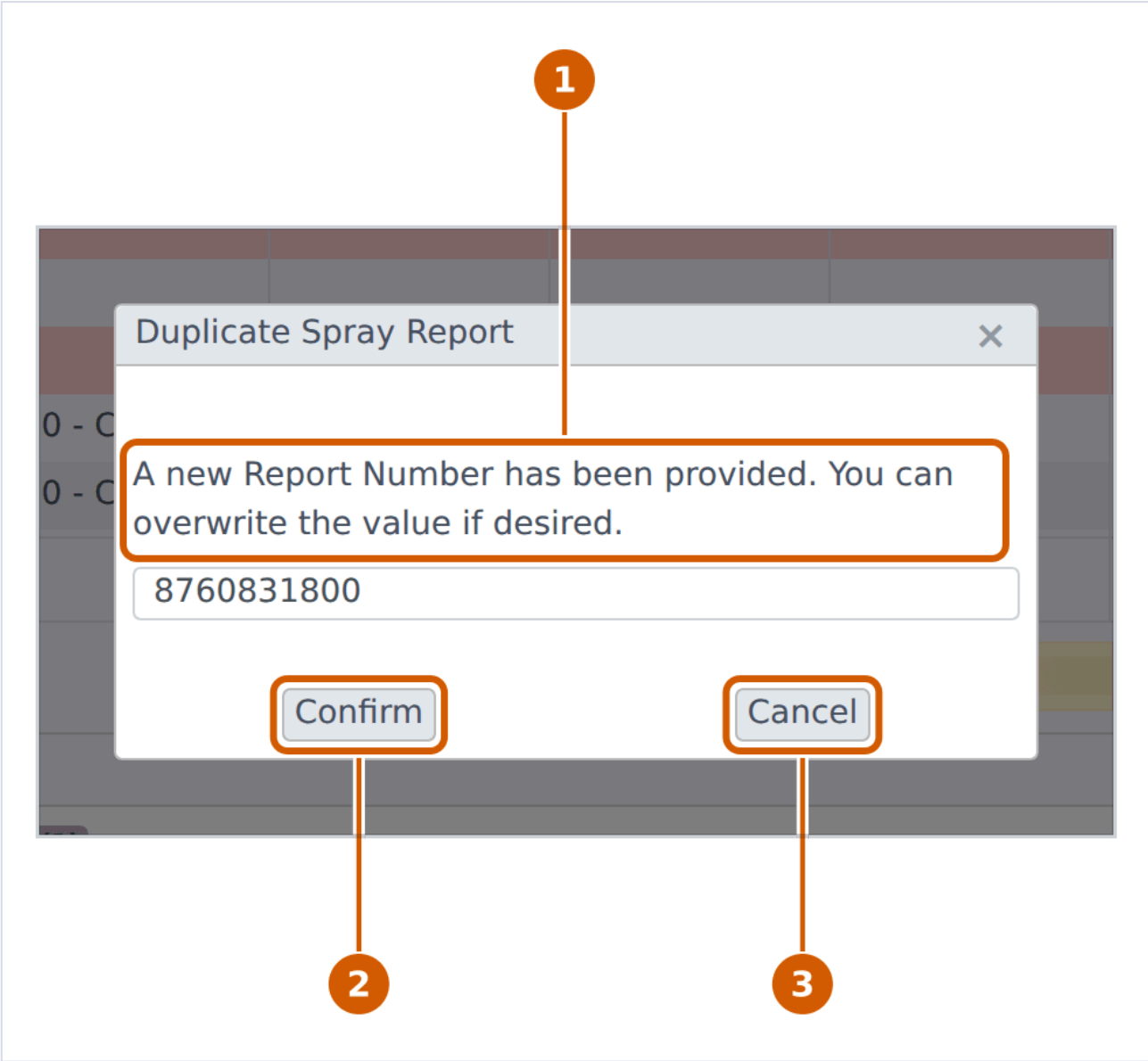
10. If you need to, fill in the address fields (**Address 1:**, **Address 2:**, **City:**, **State:**, **Zip Code:**, **Zip Ext. :**).
11. Click **Submit**. IRIS10 saves the Use Location and its GPS points for the Spray Report. The **Set Use Location** button turns orange when the selected report has a Use Location.

> **Note: Clear** only empties the form and the GPS point list. It saves nothing and deletes nothing.

Duplicate a Spray Report

1. Select the Spray Report you want to copy.
2. Click **Duplicate report** on the toolbar. The **Duplicate Spray Report** window opens with a new report number and the text `A new Report Number has been provided. You can overwrite the value if desired.` If no row is selected, IRIS10 shows `Please select a record before duplicating a spray report.`

> **Note:** Use the toolbar button. **Duplicate Report** is greyed out in the Options menu.



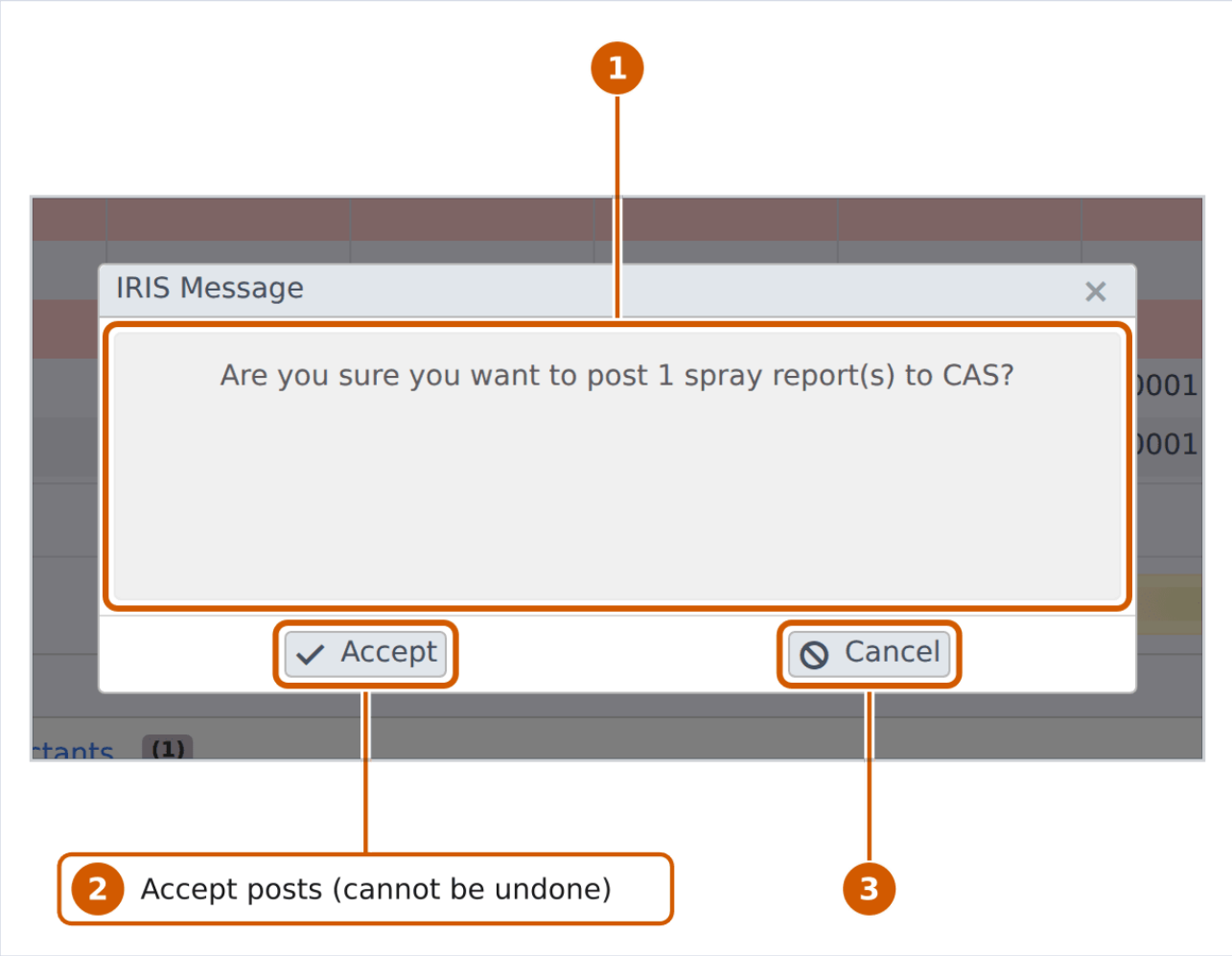
The Duplicate Spray Report window offers a new report number that you can change.

1. New report number (editable)
2. Confirm
3. Cancel

3. Keep the number offered, or type a different one. The box accepts whole numbers only, up to 10 digits.
4. Click **Confirm**. To close the window without copying, click **Cancel** instead. IRIS10 shows `Spray report duplicated successfully.` and reloads the grid. The copy has the original's details and all its employees, equipment, Chemicals and Surfactants. It is Active, not CAS Posted, not PURS Posted, and has no attached documents. If the number is already used, IRIS10 shows a message that the report number already exists.

Post Spray Reports to CAS

1. Select one or more Spray Reports in the grid.
2. Click **Post to CAS** on the toolbar. An IRIS Message asks `Are you sure you want to post N spray report(s) to CAS?` with **Accept** and **Cancel**. If no row is selected, IRIS10 shows `Please select at least one spray report to post to CAS.`



Post to CAS asks you to confirm how many selected reports to post.

1. Number of selected reports
2. Accept posts (cannot be undone)
3. Cancel

3. Check the count in the message, then click **Accept**. To stop, click **Cancel** instead. IRIS10 creates timecards for labor (employees), equipment and materials (Chemicals and Surfactants), depending on what your VMS configuration allows. IRIS10 marks each posted report CAS Posted. When every report posts, the grid refreshes and IRIS10 shows `Spray reports posted to CAS successfully.`
4. If some reports were skipped, read the list of errors that opens. Each entry shows a Record and a Message. You can download the list as CSV, PDF or JSON. The CSV has the columns Record and Message.

5. Fix the problem on each skipped report, for example add a missing activity or pay type, or have the employee's rate set up for the spray date.
6. Select the fixed report and post it again, starting from step 1.
7. Check your notifications for the posting result. You receive a notification for the Post Spray Reports to CAS feature. See Notifications.

> **Important:** Posting to CAS cannot be undone. There is no unpost.

Deactivate the filtered Spray Reports

1. Filter the grid so that it shows only the Spray Reports you want to deactivate. Only those reports are in the current filter. IRIS10 ignores row selection.
2. Click **Deactivate all** on the toolbar. IRIS10 asks `Are you sure you want to deactivate all N spray reports you are currently filtered to?` with **Accept** and **Cancel**. If the filter matches no reports, it shows `There are no spray report records present to deactivate.`
3. Check the number in the message.
4. Click **Accept**. IRIS10 shows `{N} spray reports were deactivated.` IRIS10 sets the reports to inactive. It does not delete them.
5. To reactivate a report, open it in the editor.
6. Switch **Active** back on.

> **Important: Deactivate all** acts on every Spray Report in the current filter, not on the rows you selected.

View and print Spray Reports

1. To print Spray Reports, filter the grid to the reports you want.
2. Click **View spray report**. With one report in the filter, the Spray Report opens straight away. With more than one, IRIS10 asks `Are you sure you want to print all N spray reports you are currently filtered to?` (**Yes**/**No**). With none, it shows `There are no spray report records present to print.`
3. To see the daily spray log, select a Spray Report.
4. Click **View daily spray log**. The daily spray log for the selected report opens. If none is selected, IRIS10 shows `Please select a spray report to view.`
5. To get a paper form for the field, click **Print blank spray report**. A blank spray report PDF opens in a new window.
6. To get a blank form as a spreadsheet, click **Export blank report to excel**. The **Export Blank Spray Report** window asks `Choose an export format:`

   > **Note:** Use the toolbar button. **Export Blank Report to Excel** is greyed out in the Options menu.

7. Choose Excel or CSV. The file you choose downloads.

Reference

Spray Report toolbar buttons

BUTTON	TOOLTIP	ACTS ON	NOTES
Set Use Location	Click to set the use location information.	Selected row	Turns orange when the report has a Use Location. Greyed out in the Options menu, so use the toolbar button.
Deactivate all	Click to deactivate all spray reports in the currently filtered dataset.	Every report in the current filter	Sets reports to inactive. Does not delete them.
Create PURS EDS File	Click to create PURS EDS File.	—	Always disabled. Not available in IRIS10.
Post to CAS	Click to post the spray reports to cost accounting.	Selected rows	Creates timecards. There is no unpost.
Duplicate report	Click to duplicate the current spray report.	Selected row	Menu label: **Duplicate Report** (greyed out in the Options menu).
View spray report	Click to view the spray report.	Every report in the current filter	Asks before printing more than one.
View daily spray log	Click to view the daily spray log.	Selected row	
Print blank spray report	Click to print blank spray report.	—	Opens a blank PDF form.
Export blank report to excel	Click to export a blank spray report to Excel.	—	Excel or CSV. Menu label: **Export Blank Report to Excel** (greyed out in the Options menu).

Detail tab fields

TAB	REQUIRED	OPTIONAL
Employees	Employee, Hours	Activity, Pay Type
Equipment	Equipment, Hours	Activity, Spray Delivery, Spray Application, Spray Pressure, Swath
Chemicals	Agent Products, Agent Supplier, Quantity, Agent UOM, Agent Purpose, Rate 1, Rate UOM 1, Rate 2, Rate UOM 2	Activity
Surfactants	Surfactant, Quantity, Agent UOM, Rate 1, Rate UOM 1, Rate 2, Rate UOM 2	Activity

What Post to CAS checks and creates

ITEM	RULE
Activity	Every employee, equipment, chemical and surfactant row needs an activity. If a row has none, IRIS10 uses the report's own Activity. If neither is set, Post to CAS skips the report (for example: `one or more employees are missing an activity`).
Pay type	Every employee needs a pay type, or Post to CAS skips the report (`one or more employees are missing a pay type`).
Employee rate	Every employee needs a rate that covers the spray date, or Post to CAS skips the report (`one or more employees have no rate covering the spray date`).
Already posted	Post to CAS skips reports that are already CAS Posted.
Resource types	IRIS10 creates labor, equipment and material timecards only if your VMS configuration turns each one on.
Task date and fiscal year	Timecards use the Spray Date as the task date. The fiscal year comes from the spray date.
Comment	Each timecard row carries the comment `Spray Report #: <report number>`.
Equipment cost	Comes from the equipment rate for the fiscal year.
Material cost	Unit of measure, description and unit cost come from the inventory item and inventory location linked to the chemical or surfactant.
Production	IRIS10 records **Area Sprayed** as production on the first timecard row only. Other rows show 0.
Employee on equipment and materials	If your configuration has this setting on, IRIS10 adds the first employee on the report to the equipment and material timecard rows.
Result	IRIS10 marks each posted report CAS Posted.

Use Location - Spray Report window

FIELD OR BUTTON	USE
Nickname:	A name for the Use Location.
Township: / **Range:** / **Section:** (start and end)	Township and Range come from lookup lists. Section is 00 to 36.
TRS Name:	A name for the township/range/section entry.
GPS Name:	One name for the whole location, up to 75 characters.
Latitude / **Longitude**, **Add Point**	Adds a point to the GPS point list. IRIS10 rejects points outside Oregon.
Open map	Click to view map tool.
Clear Latitude/Longitude button	Empties the latitude and longitude boxes.
Move up / **Move down** / **Remove**	Reorder or remove GPS points in the list.

FIELD OR BUTTON	USE
Address 1:, **Address 2:**, **City:**, **State:**, **Zip Code:**, **Zip Ext. :**	The address of the location.
Submit	Saves the Use Location and its GPS points for the report.
Clear	Empties the form and the GPS point list. Nothing is saved or deleted.

Messages on the Spray Report screen

MESSAGE	WHEN	WHAT TO DO
`Please select a record before using the set location feature.`	**Set Use Location** with no row selected	Select a report first.
`Please select a record before duplicating a spray report.`	**Duplicate report** with no row selected	Select a report first.
`Please select at least one spray report to post to CAS.`	**Post to CAS** with no row selected	Select one or more reports.
`Are you sure you want to post N spray report(s) to CAS?`	**Post to CAS**	Check the count. Click **Accept** to post or **Cancel** to stop.
`Spray reports posted to CAS successfully.`	After posting	None.
`There are no spray report records present to deactivate.`	**Deactivate all** with an empty filter	Change the filter.
`Are you sure you want to deactivate all N spray reports you are currently filtered to?`	**Deactivate all**	Check that N matches what you expect before you click **Accept**.
`{N} spray reports were deactivated.`	After **Deactivate all**	None.
`Unable to deactivate the selected spray reports. An email has been sent to support.`	**Deactivate all** failed	Try again later or contact support.
`Spray report duplicated successfully.`	After **Confirm** in **Duplicate Spray Report**	Find the new report at the top of the grid.
`There are no spray report records present to print.`	**View spray report** with an empty filter	Change the filter.
`Are you sure you want to print all N spray reports you are currently filtered to?`	**View spray report** with more than one report in the filter	Choose **Yes** to print all of them or **No** to stop.
`Please select a spray report to view.`	**View daily spray log** with no row selected	Select a report.
`Your {field} is required.`	Saving a report with a required field empty	Fill in the field.

Tips and notes

Important: Deactivate all acts on every Spray Report in the current filter, not on the rows you selected. Check the count in the confirmation before you click **Accept**. Deactivated reports are not deleted, and you can switch **Active** back on in the editor.

Important: Posting to CAS cannot be undone. There is no unpost. Before you click **Accept**, check that the employees, equipment, Chemicals, Surfactants and spray date are correct.

Note: Create PURS EDS File is always disabled in IRIS10 and does nothing.

Tip: Set Use Location, **Duplicate Report** and **Export Blank Report to Excel** are greyed out in the Options menu. Use their toolbar buttons instead.

Note: The toolbar actions on this screen need security level 4. If you can't use them, ask your administrator about your access.

Tip: Add a pay type to each employee and an activity to the report before posting. Rows without an activity use the report's **Activity**, and an employee without a pay type causes the report to be skipped.

Note: In the **Use Location - Spray Report** window, **Clear** only empties the form and the GPS point list. It does not delete a saved Use Location.

Tip: Use **Duplicate report** for repeat spray jobs. The copy keeps the crew, equipment, Chemicals and Surfactants and starts as not CAS Posted, so you can edit it and post it.

Related topics

- PURS reports and use locations
- Grid filters
- Notifications
- Posting timecards
- Grid viewing and editing
- Security Administration: access levels by user
- User defined fields

PURS reports and use locations

Overview

PURS Spray Report is a standard Vegetation Management grid of PURS reports. Each report has child PURS Report Agent rows. Use Location Manager is a standard grid list of use location names. Neither screen has special toolbar buttons or menu items.

This page covers how to:

- Open the PURS Spray Report screen and find existing reports.
- Add a PURS report.
- Complete the agent row that opens after a report saves.
- Add more agents to a report.
- Delete reports.
- Maintain use location names.

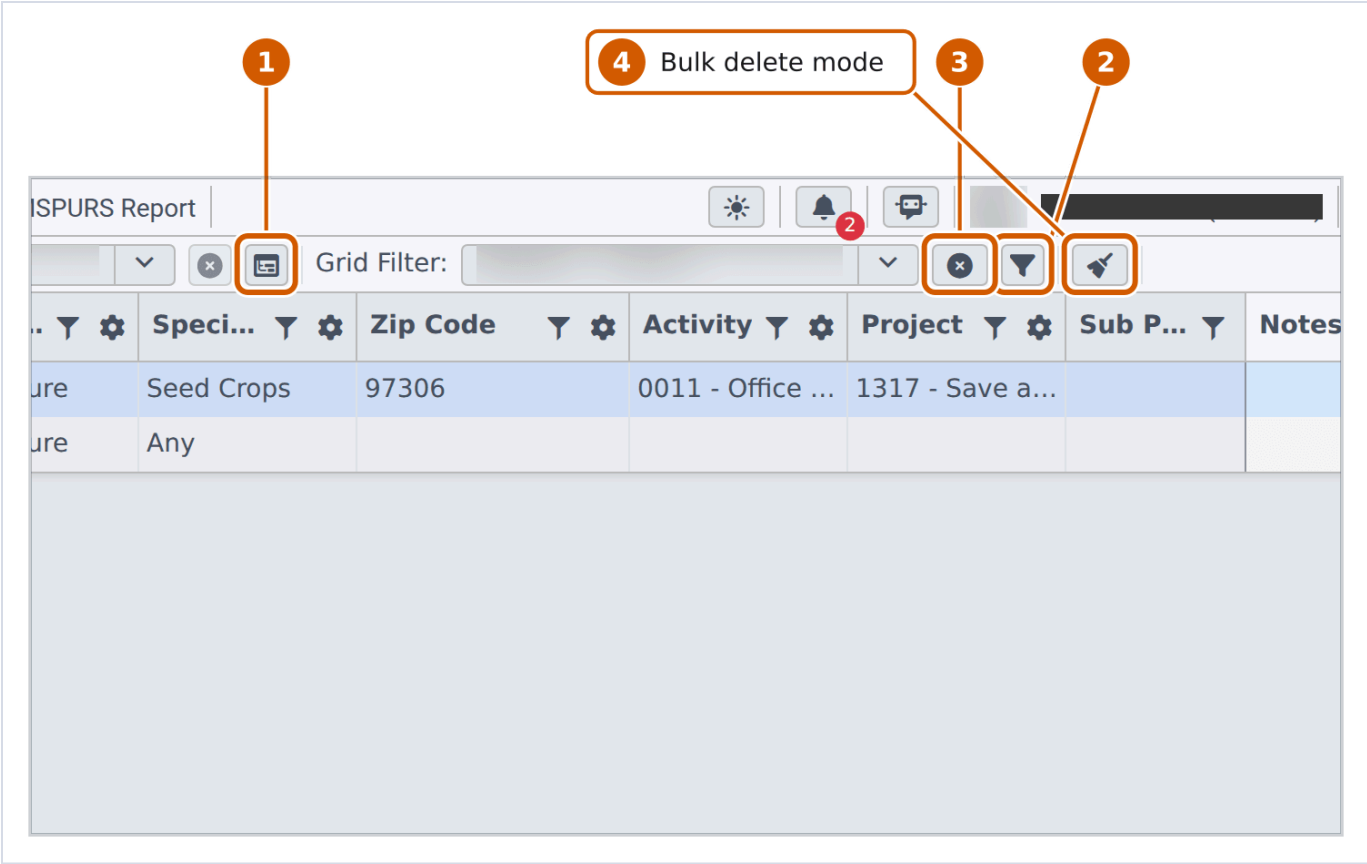
Before you begin

- Sign in to IRIS10.
- Make sure you have access to the Vegetation Management screens **PURS Spray Report** and **Use Location Manager**.
- Be familiar with adding, editing, filtering and deleting rows in the shared data grid. See Grid viewing and editing and Data grid overview and basics.
- To reach the Vegetation Management menu, see Navigating portals and pages.

Procedure

Open the PURS Spray Report screen

1. From the main menu, open **Vegetation Management** and choose **PURS Spray Report**. The **PURS Spray Report** grid opens. It lists reports sorted by **Report Number** in ascending order. The columns are **Report Number**, **Watershed**, **Spray Date**, **Site Category**, **Specific Site**, **Zip Code**, **Activity**, **Project**, **Sub Project**, **Road**, **Mgt Unit**, **Program**, **Zone**, **Active**, **PURS Posted**, **CAS Posted**, **Created Date**, **Created By**, **Last Updated Date**, **Updated By**, **Notes** and **Documents**.



The PURS Spray Report grid, with the standard grid toolbar.

1. Grid configuration editor
2. Filter editor
3. Clear filter
4. Bulk delete mode: used to delete reports; deleting also removes their comments and documents.

Add a PURS Spray Report

1. On the **PURS Spray Report** screen, use the grid's Add tool to open a new report in the editor. The **PURS Spray Report** editor opens, with the required fields in the **PURS Spray Report Info** section.
2. Enter a **Report Number** of up to 10 characters.
3. Select a **Watershed**.
4. Select a **Site Category**.
5. Select a **Specific Site**.
6. Set **PURS Posted** to Yes or No. IRIS does not set this flag for you.
7. Set **CAS Posted** to Yes or No.
8. If needed, enter a **Spray Date** in the format `MM/dd/yyyy`.
9. If needed, enter a **Zip Code** of up to 5 characters.
10. If needed, select an **Activity**.
11. If needed, select a **Project**.

12. If needed, select a **Sub Project**. Select the **Project** first, because the **Sub Project** choices depend on it.
13. If needed, select a **Road**.
14. If needed, select a **Mgt Unit**.
15. If needed, select a **Program**.
16. If needed, select a **Zone**.
17. Leave **Active** set to Yes, its default, unless the report should be inactive.
18. Save the report. If the save succeeds, IRIS shows the message "A default PURS Report Agent record was created, please edit as appropriate." If the save returns errors, this message is not shown. Correct the errors and save again.

Complete the agent row after a new report saves

1. Close the message "A default PURS Report Agent record was created, please edit as appropriate." The new report row expands, and a new agent row opens for editing in its **PURS Report Agent** child grid. This happens if the report is on the current page of the grid.

   > **Note:** If you save with **Save & Add New**, the message appears above the next new-report editor instead of in a separate message window.

   > **Tip:** If the new report appears on another page of the grid, IRIS does not open the agent row automatically. Go to the report, expand it and add the agent in the **PURS Report Agent** child grid. See Add another agent to an existing PURS report.

2. Select the **Agent Products**.
3. Enter the **Agent Quantity** as a number with up to 4 decimal places.
4. Select the **Agent UOM** from the VMS agent unit-of-measure list.
5. Select the **Agent Purpose**.
6. If a surfactant was used, enter the **Surfactant**, **Surfactant Quantity** and **Surfactant UOM**.
7. Save the agent row.

Add another agent to an existing PURS report

1. On the **PURS Spray Report** screen, expand the report row to show its **PURS Report Agent** child grid.
2. Use the Add tool in the child grid to add an agent. A new agent row opens for editing. The **PURS Report Agent** editor (section **PURS Report Agent Info**) is also available as a pop-out.
3. Fill in **Agent Products**, **Agent Quantity**, **Agent UOM** and **Agent Purpose**, plus any surfactant fields.
4. Save the row.

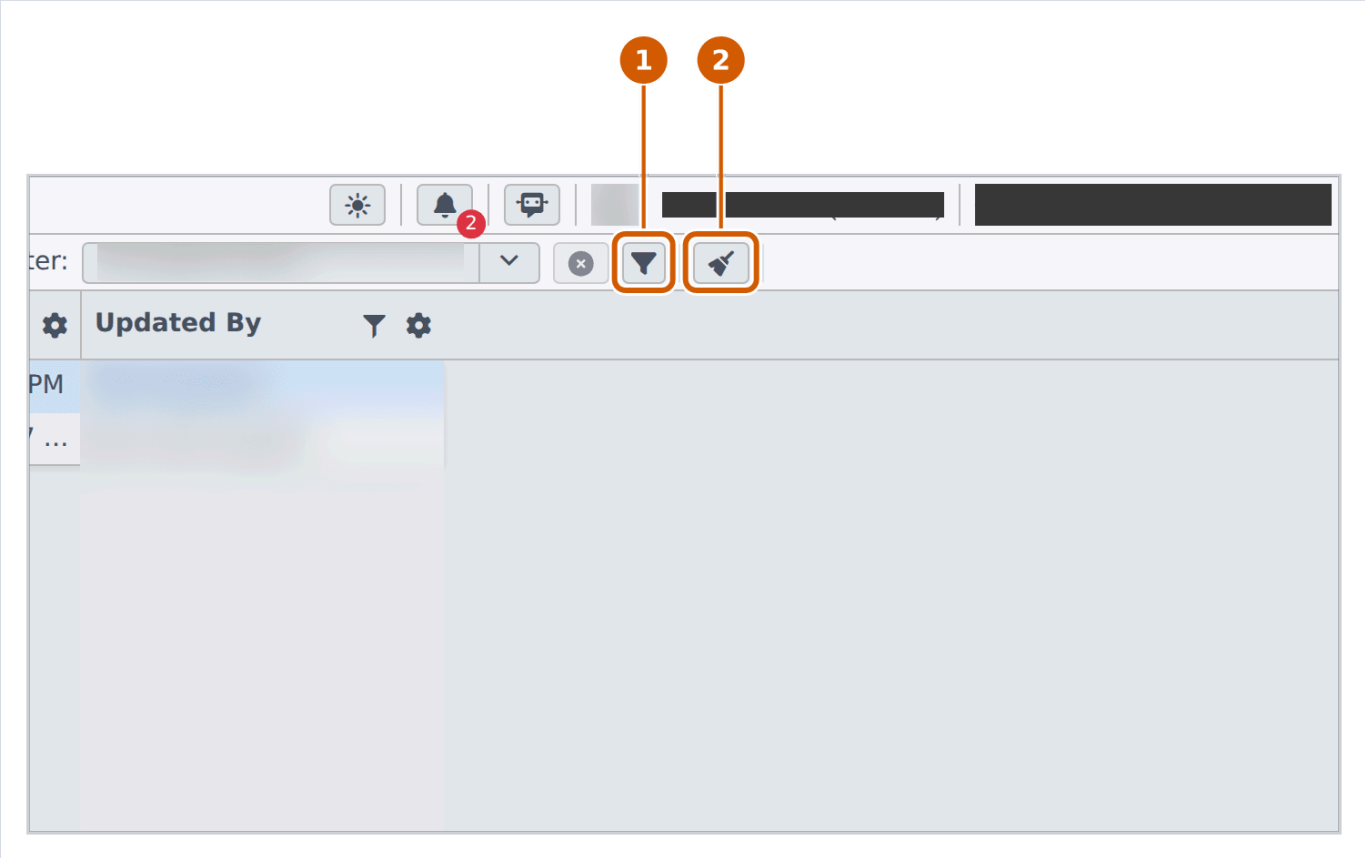
Delete PURS reports

1. On the **PURS Spray Report** toolbar, click **Bulk delete mode**. The grid enters bulk delete mode (tooltip "Click to enter bulk delete mode."). Select reports as described in Grid viewing and editing.
2. Confirm the delete. The selected reports are deleted together with their comments and attached documents. A copy of each deleted report is kept in audit history.

> **Note:** If the selection includes system records, IRIS shows "Record List contains System Data which cannot be deleted."

Add or edit a use location

1. From the main menu, open **Vegetation Management** and choose **Use Location Manager**. The **Use Location Manager** grid opens, sorted by **Name** in ascending order. The columns are **Name**, **Created Date**, **Created By**, **Last Updated Date** and **Updated By**.



The Use Location Manager grid lists use location names, sorted by Name.

1. Filter editor
2. Bulk delete mode

2. To add a use location, use the grid's Add tool. To edit one, open an existing row. The **Use Location Manager** editor opens (section **Use Location Manager Info**).
3. Enter the **Name**, up to 75 characters.
4. Save the row. If **Name** is blank, the save is rejected. Enter a name and save again.

Reference

PURS Spray Report fields

FIELD	REQUIRED	NOTES
Report Number	Yes	Up to 10 characters
Watershed	Yes	Dropdown
Site Category	Yes	Dropdown
Specific Site	Yes	Dropdown
Spray Date	No	Date, shown as `MM/dd/yyyy`
Zip Code	No	Text, up to 5 characters
Activity	No	Lookup
Project	No	Lookup
Sub Project	No	Lookup; choices depend on the selected **Project**
Road	No	Lookup
Mgt Unit	No	Lookup
Program	No	Lookup
Zone	No	Lookup
Active	Not marked required in the editor	Yes/No; defaults to Yes
PURS Posted	Yes	Yes/No; IRIS does not set it automatically
CAS Posted	Yes	Yes/No

For background on dropdown lookup lists, see Lookup values.

PURS Report Agent fields

FIELD	REQUIRED	NOTES
Agent Products	Yes	Dropdown
Agent Quantity	Yes	Number, up to 4 decimal places
Agent UOM	Yes	From the VMS agent unit-of-measure list (not the **Units of measure** screen)
Agent Purpose	Yes	Dropdown
Surfactant	No	

FIELD	REQUIRED	NOTES
Surfactant Quantity	No	
Surfactant UOM	No	From the **Units of measure** screen. See Units of measure, fiscal years and organizations.

Use Location Manager fields

FIELD	REQUIRED	NOTES
Name	Yes	Up to 75 characters; the list sorts by **Name** ascending

Toolbar buttons on PURS Spray Report and Use Location Manager

BUTTON	TOOLTIP
Clear grid configuration	Click to clear grid configuration.
Grid configuration editor	Click to open grid configuration editor.
Clear filter	Click to clear applied grid filter.
Filter editor	Click to open grid filter editor.
Bulk delete mode	Click to enter bulk delete mode.

For details, see Grid filters and Grid configurations.

Terms

- **PURS Spray Report:** the Vegetation Management screen and editor for PURS reports. Each report can have one or more agent rows.
- **PURS Report Agent:** a child row of a PURS report. It records an agent product, its quantity, its unit and its purpose, plus an optional surfactant.
- **Use Location Manager:** the Vegetation Management grid list of use location names.
- **PURS Posted:** a required Yes/No field on a PURS report. IRIS does not set it automatically.
- **CAS Posted:** a required Yes/No field on a PURS report.
- **Active:** a Yes/No field on a PURS report that defaults to Yes.
- **Agent UOM:** the unit of measure for the **Agent Quantity**, chosen from the VMS agent unit-of-measure list.
- **Surfactant UOM:** the optional unit of measure for the **Surfactant Quantity**, taken from the **Units of measure** screen.

Tips and notes

> **Important: Agent UOM** comes from a separate VMS agent unit-of-measure list, not the **Units of measure** screen. Only **Surfactant UOM** uses the **Units of measure** screen.

Important: Creating the PURS EDS upload file is not available in IRIS10. The **Create PURS EDS File** button on the **VMS Spray Report** screen is disabled and does nothing. See Spray reports.

Important: Deleting a PURS report also deletes its comments and attached documents.

Note: PURS Posted is read-only on the **Spray Report** editor. On the **PURS Spray Report** editor it is a required Yes/No field that you set yourself.

Note: An agent row always belongs to its PURS report. You cannot move it to a different report.

Related topics

- Spray reports
- Grid viewing and editing
- Data grid overview and basics
- Grid filters
- Grid configurations
- Units of measure, fiscal years and organizations
- Lookup values
- Navigating portals and pages

Quick facts (unsorted)

Facts added from chat (`/csr` or the Wiki+ button) or migrated from before the wiki. Sort them into proper pages over time; publish this page to make them live.

IRIS 10 is the 10th version of the Integrated…

IRIS 10 is the 10th version of the Integrated Road Information System